EXECUTIVE SUMMARY

NOVA ARTS AND CULTURE SECTOR STUDY

1. INTRODUCTION

The purpose of The Nova Scotia Arts and Culture Sector Study is to provide a detailed, reliable information base on the arts and culture sector in Nova Scotia, to assess the sector's needs, the opportunities for development and the extent to which effectiveness and efficiency can be improved through human resource development, technological innovation, market expansion and quality development.

This study was undertaken with the encouragement and financial assistance of the Atlantic Canada Opportunities Agency, the Nova Scotia Department of Economic Development, and Communications Canada; and with the cooperation of the Nova Scotia Department of Tourism and Culture, and the Cultural Federations of Nova Scotia. Representatives of these agencies participated in the Project Team which worked in a dedicated and creative way throughout the study process with the consultants from LORD Cultural Resources Planning and Management Inc. and Deloitte and Touche Management Consultants. The consultants wish to acknowledge with gratitude all those artists and cultural workers who took the time to complete our surveys, to participate in focus group sessions and to share with us their concerns and their aspirations for their sector.

While expressing our appreciation for the assistance we have received in conducting this study, the consultants take full responsibility for the analysis, conclusions and recommendations contained in the report.

The complete report consists of six chapters and nine appendices that detail the findings of the following main research tasks:

- surveys of individual artists and other members of the province's culture labour force;
- surveys of arts and cultural organizations;
- focus group sessions conducted with artists and cultural workers in three regions of the province;

- analysis of selected recent studies or works in progress which examine artists and their work and living conditions elsewhere in Canada and the United States. This review included six national studies, six provincial studies, two regional/municipal studies and six United States studies. The findings of this review served as a useful comparative context for the data on the Nova Scotia arts and culture sector.

This executive summary presents the highlights of the consultants' findings, conclusions and recommendations. Readers are encouraged to consult the full report for details on methodology, qualitative and quantitative data and the consultants' recommendations. The appendices to the full report present a useful data resource to be further analyzed by individual artists and arts and culture organizations as well as governments seeking to plan programmes and to generate greater understanding of the strategic importance and economic dynamism of Nova Scotia's arts and culture sector.

2. SURVEY OF INDIVIDUAL ARTISTS

It was apparent from the outset of the study that the definitions of "artist," arts and non-arts income and the parameters of the sector in terms of professional and non-professional artists vary significantly among the many studies extant. The assumptions underlying the approach in the Nova Scotia Arts and Culture Sector Study were:

- that the survey population should be as inclusive as possible, reflecting the diversity of Nova Scotia's cultural labour force;

- that figures on arts income should be as comprehensive as possible to address the "mixed economy" of the sector which incorporates numerous categories of arts and non-arts employment;

- that artists themselves should define their status as professional or non-professional and should define what constitutes arts income and non-arts income. The consultants recognize that what is arts income to one artist may be non-arts income to another (e.g. teaching art classes).

The following categories of artists were surveyed; literary artists, visual artists, performing artists, craftspersons, media and sound recording artists, and heritage workers (excluding the staff of governmental institutions). In the interests of identifying artists as practitioners of one or more art forms, employment in broadcast media, newspapers and teaching in primary schools and library work was excluded from the scope of the study.

The result is a wealth of information about the diversity of Nova Scotia's artists which can be cross tabulated to provide focused information on particular sectors. Taken as a whole, the findings of this study provide a comprehensive picture of the arts and culture labour force of the province, its needs and its contribution to the province's economy.

The response rate to the survey of individual artists was 20% of 3,395 persons who received questionnaires, or a total of 670 respondents. In the judgement of the consultants, the respondents are representative of the population, which we estimate at about 3,700 to 4,000 artists, and generalizations can therefore be made from the survey data.

2.1 PROFILE OF RESPONDENTS

Artists were asked to identify the main discipline by which they define their arts and culture activities within the categories of literary arts, visual arts, performing arts, crafts, media arts/sound recording, heritage and other. Performing artists represent the largest group of respondents (38%), followed by visual artists (26%) and literary artists (23%). Crafts (9%), media/sound recording (3%) and heritage professionals (1%) represent a much smaller group of respondents.

In addition to their main disciplines, 72% of respondents identified at least one secondary activity. On average, artists reported being involved in 2.4 secondary activities.

2.2 ARTS AND CULTURE EMPLOYMENT

A number of interesting and significant patterns emerged from the survey data regarding the characteristics of respondents in terms of full-time vs. part-time employment, seasonality and types of employment:

- Slightly more artists work part-time at their art than do those who work full-time. This part-time figure is significantly higher than that for Ontario artists.

- Some 87% of respondents work year-round in the arts and culture sector. Seasonal workers work most often in the winter (77%), followed by fall (66%), spring (61%) and summer (40%).

- Over two-thirds of respondents are self-employed or free-lancers with respect to their arts activities. In comparison, 24% of artists in Ontario are self-employed. Eighteen percent of respondents reported owning small businesses in the arts and culture sector.

- Less than half of respondents (44%) are represented by dealers, publishers, agents, marketing organizations, cooperatives, or some other organization. The difficulty of finding good agents, dealers and publishers was frequently mentioned as an obstacle in tapping new markets.

2.3 ARTS AND CULTURE INCOME AND EXPENDITURES

Survey respondents have higher (12%) average personal incomes than the average personal income of employed persons in the Nova Scotia. However, the largest portion of respondents (32%) reported total arts and non-arts income of less than $15,000; over 60% of respondents reported income of $30,000 or less; only 8% reported personal incomes over $60,000; and only 2% reported personal incomes over $90,000.

The discipline with the highest average personal income is media arts/sound recording. This discipline includes the highest percentage of men. The crafts discipline averaged the lowest personal income and includes the highest percentage of women.

In the middle income categories, from $15,000 to $45,000, there is a higher percentage of full-time artists relative to part-time artists. However, in the higher income categories, above $45,000, part-time artists are more numerous than full-time (22% vs. 15%).

Survey respondents are earning a greater percentage of their personal income from their arts and culture activities than they did five years ago. On average, survey respondents currently derive 46% of their total personal income from their arts and culture activities. Five ago this figure was 42%. Respondents were also optimistic that this trend would continue, estimating that this figure would rise to 59% five years from now.

The most frequently mentioned sources of arts and culture income were fees (41%) and sales (39%). The most financially rewarding source was sales (identified by 26% of respondents), followed by salaries at 18% and fees at 16%.

Expenditure on their arts and culture activities accounted for a significant portion of the respondents' expenditures. The 540 respondents who provided data on expenditures spent an average of $12,500 or 45% of their total personal incomes, on their arts-related work over the past year. The most frequently mentioned expenses were supplies, followed by travel, equipment and staff.

On average, 83% of the expenditures of Nova Scotia's individual artists are purchases within the province. If we assume our sample represents 20% of the population of all artists in the Province, and that our sample is representative of the expenditures of all artists as defined by this study, this would mean that operating expenditures of individuals in the arts and culture sector represent over $35 million injected into the Nova Scotia economy for direct purchases of goods. Net income to individual artists from their arts and culture activities represents and additional $8 million.

2.4 NON-ARTS INCOME

Almost three-quarters of respondents generate some of their income from non-arts sources. This figure is substantially higher than the national data on the number of artists earning non-arts income. The most common form of non-arts income is professional employment, followed by pension/retirement and support from family and friends.

Literary artists are more likely to generate non-arts income and performing artists are least likely. Not surprisingly, part-time artists are more likely to generate non-arts income than are full-time artists.

2.5 ARTS AND CULTURE MARKETS

While a significant number of the respondents see their market as extending outside the province and Canada, residents of Nova Scotia are the primary market/audience for the respondents' work. In terms of future markets for their arts and culture products and services, most artists see various parts of Canada as holding the greatest potential. The United States is seen to hold good market potential for nearly four out of ten artists.

Markets differ by discipline. Tourists and visitors to the Nova Scotia are seen as a particularly important market for visual artists and craftspeople, while the rest of Canada is particularly important for literary artists.

Artists expressed a great need for assistance to tap new markets. The government is seen by them as the major source of this assistance. The most common form of help required by respondents to reach these markets is financial, such as assistance for travel to shows, and training courses. Another major need of artists in reaching these potential markets is marketing and promotional assistance, in some cases financial assistance to advertise and market and in other cases advice on how best to market products and enhance exposure. Assistance was also requested in the general provision of information.

2.6 ARTS AND CULTURE FACILITIES

In order to develop a picture of the working conditions of artists in terms of arts and culture facilities, respondents were asked to identify the type of facility in which they create and the type of facility in which they present their work.

More than 80% of respondents identified "own/other residence" as a facility in which they create, and fully two-thirds identified it as the type used most often. Only 36% of respondents identified a "purpose-designed gallery, theatre, auditorium" as a facility in which they create and only 19% used this type of facility most commonly. Full-time artists and performing artists were more likely than others to use purpose-designed facilities.

Purpose-designed facilities were most commonly cited as the location where respondents present their work (54%).

2.7 DEMOGRAPHIC INFORMATION

While respondents are, on average, evenly split between males and females, the crafts discipline is heavily skewed toward females, while the majority of media arts/sound recording respondents are male.

Females are more likely (59%) to be recent entrants to the arts and culture sector (0 to 5 years) than are males. Only 34% of respondents who have been earning arts and culture income for more than 25 years are female.

Survey data indicate that respondents are better educated than the average for Nova Scotia, 63% having graduated from university (including graduate and undergraduate degrees), compared to 11.5% of the Nova Scotia population, 15 years and older. Furthermore, almost 80% of respondents have attended workshops or courses, while 25% have participated in an apprenticeship or mentor programme.

On average, survey respondents are older than the general population and the labour force in Nova Scotia. Artists live throughout the province, with the largest percentage (57%) residing in the Halifax area.

2.8 OPINIONS AND COMMENTS

When asked for their comments and opinions on a variety of issues relating to the arts and culture sector in Nova Scotia artists' responses were mixed, but with few exceptions, respondents agree that Nova Scotia is their preferred location to live and work.

On the question of training, the largest groups of respondents (31%) were neutral on the issue of enhancing their income from arts and culture activities through training. However, more agreed than disagreed that training would be an asset. Just over half (54%) preferred training in the areas of arts skills/techniques over business training or training in advanced technology in their discipline.

The majority of respondents did not think that training was available in an acceptable format and price. In particular, the cost of training was seen to be prohibitive. Some types of highly advanced training were not believed to be available in the province at any price.

3. SURVEY OF ARTS AND CULTURE ORGANIZATIONS

A total of 187 arts and culture organizations in the province responded to the survey. The responding organizations included four types: amateur not-for-profit organizations providing product to consumers/audiences (34%); professional not-for-profit organizations providing product to consumers/audiences (24%); service organizations (not providing product directly to consumers/audiences) (23%); and for-profit companies (18%).

Organizations which responded to the survey were headquartered in all counties of Nova Scotia, with the exception of Queens and Richmond counties.

3.1 EMPLOYEES

The average cultural organization in Nova Scotia employs a total of about seven employees, of which more are seasonal and part-time than are full-time, year-round. Full-time, year-round employees account for less than 17% of all current employees in arts and culture organizations in Nova Scotia. This compares to about 19% five year ago. However, these organizations project that about 28% of their employees will be full-time, year-round five years from now.

While the total average number of employees for all respondent organization types has increased over the past five years and is expected to continue to do so, the average number of employees of For Profit Companies declined and is not projected to reach the levels of five years ago.

Organizations in the Professional Not For Profit Sector include the largest average numbers of employees (nearly 17) whereas Amateur Not For Profits (just over one) include the smallest average numbers, with Service Organizations (nearly 6) and For Profit Companies (over 6) in between.

3.2 VOLUNTEERS AND MEMBERS

As generally characterizes the arts and culture sector, many of the responding organizations depend at least in part on volunteers. Excluding for-profit companies, almost 90% of responding organizations operate with volunteers. The number of volunteers has increased over the past five years and is expected to increase over the next five years, yet most organizations do not offer any form of volunteer appreciation.

The outlook on memberships for responding organizations is a positive one. The average number of members is reported to be 139. This compares with 113 five years ago, and a forecast of 233 members five years from now.

3.3 MARKETS

Nova Scotia residents have always been, and will continue to be, the primary audience for the performances/exhibitions/shows of the responding organizations. However, the relative importance of Nova Scotia residents is declining in favour of markets outside Nova Scotia, reached by out-of-province tours by Nova Scotian artists.

The majority of organizations are optimistic about the future size of their audience. Fully 70% believe their total audience will increase over the next five years.

Regarding product sales, the main market is currently within Nova Scotia. However, the trend has been, and is projected to continue to be, for increased out-of-province sales.

3.4 FINANCES

Responding organizations reported annual expenditures which average over $139,000 per organization. The vast majority of operating expenses (88%) stay within Nova Scotia. Assuming the sample represents 20% of all arts and culture organizations in the province and that it is representative, then arts and culture organizations inject almost $51 million annually into the Nova Scotia economy on salaries, wages and benefits and nearly $70 million in other expenditures within Nova Scotia. The total direct impact of arts and culture organizations on the provincial economy is a combined $121 million.

3.5 OPINIONS AND COMMENTS

Respondents' visions for the future of their organizations range from simply continuing to promote, develop and celebrate their respective arts and culture activities, to increasing their size over the next few years. They are generally positive regarding the opportunities in the arts and culture sector. There were seen to be opportunities for their organizations to contribute to sustainable economic development, as well as to enhance the quality of life in the province.

According to the responding organizations, the primary constraint to achieving their visions is lack of financial support for both operating costs and capital projects and the resulting impact on human resources. The most frequently mentioned forms of assistance include support in the promotion of arts and culture, and in access to training and expertise.

4. FOCUS GROUPS

During the week of March 31, 1992, the consultants conducted 12 focus group sessions in Halifax, Sydney and Annapolis Royal with a total participation of 75 artists from all disciplines included in the study. Each focus group brought together practitioners of one discipline including professionals, non-professionals, full-time and part-time artists, administrators of arts and culture organizations and volunteers.

The focus groups provided an opportunity for discussion and "reality testing" of preliminary survey results among the actual arts and culture practitioners. This greatly assisted the consultants in interpreting the data. The consultants led each focus group through a discussion of its sector in terms of: constraints to economic viability, opportunities for increasing economic viability and recommendations on the future role of key stakeholders including artists and cultural workers, cultural organizations, government and the private sector.

General issues and concerns most frequently mentioned during the sessions fall into four main areas: financial - levels and mechanisms for funding; partnerships - potentially beneficial linkages between and within culture and related sectors; recognition - affirming the importance of the arts; and training - the types of training opportunities needed within the sector.

The full report summarizes each focus group session. The results of this research, along with the survey data and contextual research, contributed to the assessment of the opportunities in the various components of the arts and culture sector.

5. CONCLUSIONS AND RECOMMENDATIONS

The study identifies four main opportunities for the future economic viability of the arts and culture sector and four critical needs to be addressed in order to maximize these opportunities.

5.1 OPPORTUNITIES

(i) Size of the Sector

The size of the arts and culture sector in itself represents an opportunity. The estimated current Nova Scotia arts and culture labour force as defined by this study is 3,700-4,000 and there are indications of a number of growth opportunities which will affect the sector. These include:

- optimism on the part of respondents that their arts and culture income will grow over the next five years;
- the general aging of the population and the fact that artists tend to be in older age categories is positive in that artists' income is generally shown to increase with age.

(ii) Economic Contributions of the Sector

The Nova Scotia's arts and culture sector contributes significantly to the economy of the Province. This contribution is estimated to total $164 million in salaries and direct expenditures within Nova Scotia by arts organizations and individual artists. This direct impact does not take into account indirect and induced impacts and qualitative contributions of the sector to tourism, community development and quality of life.

(iii) Economic Dynamism of the Sector

The arts and culture sector is an especially dynamic economic sector and itself creates opportunities for economic growth. This is evident in the following survey findings:

- There is a high proportion of the arts and culture labour force which is either self-employed or small business owners.
- Nova Scotia's artists are exceptionally well educated relative both to the levels of education of the province's labour force as a whole (in comparison and) to the level of education of the arts labour force in the province of Ontario.
- Nova Scotia's artists demonstrate flexibility in their choice of career paths and methods of earning income. Survey data demonstrate that 72% of artists identified at least one secondary artistic/cultural activity and that, on average, artists have 2.4 secondary activities in addition to their main artistic activity.
- While this is a sector with many problems, including: low remuneration levels relative to educational attainment; inadequate physical facilities; and great difficulties in working with traditional sources of business financing (to name but a few), nonetheless many of Nova Scotia's artists were optimistic about their future arts and culture income.

(iv) Link with Tourism

The link with tourism provides both real and potential opportunity for Nova Scotia artists. At present, Nova Scotia tourists/visitors represent 12.4% of the audience/market for Nova Scotia artists - there is a great deal of room for growth.

5.2 NEEDS

(i) More Opportunities for Full-time Employment

This study demonstrates that the arts and culture sector in Nova Scotia is characterized by an extremely high proportion of part-time artists. The larger picture of the economic life of Nova Scotia's arts and culture sector which emerges from this study is that the market for the arts in not sufficiently developed to maintain a healthy ratio of full-time to part-time workers in the arts labour force (which is of an average size relative to the population). Nonetheless, as a result of the resourcefulness and entrepreneurship of the province's arts and culture sector in combining various types of arts and non-arts income, the average income is 12% higher than that of the average income of employed persons in Nova Scotia and higher than the average income of Ontario artists.

The threat in this situation is decline in the quality of artistic product. Artists need to devote their full time to develop the skills, craft and ideas that lead to art of great quality. This does not mean that every individual who chooses to become an artist has a "right" or an "obligation" to work full-time at his/her art. Nor does it mean only full-time artists can produce art of quality. It does mean that for the sector as a whole (like any sector of the economy), the quality of artistic and cultural products will decline or will not be maintained at a competitive level of quality if there are not enough people working at it full-time.

Given that the arts more than any sector is dependent on quality for success, and given the economic opportunities inherent in the sector, the need for creating greater opportunities for full-time employment (or income through self-employment) in the sector is targeted by the consultants as the single greatest need.

(ii) Market Development and Expansion

Market development and expansion is a fundamental requirement for the health of the arts and culture sector. Market development and expansion will be key to establishing the economic basis for increasing full-time employment in the sector and for maintaining quality.

Export is a particularly important strategy for Nova Scotia's arts and culture sector because the resident market in the province and in Atlantic Canada has a relatively low disposable income for purchases of cultural goods and services. Survey respondents demonstrated themselves "export willing" but require considerable help to become "export-able."

(iii) Training

Survey results indicate a need for better training throughout the province, more relevant to economic needs. There is a critical need for an integrated approach to providing business-related training as part of college and university level arts and crafts education. The situation is such that a majority of graduates will likely be self-employed or owners of small businesses, yet art students are not receiving instruction on business management, tax planning and related fields of relevance to earning a livelihood through their chosen cultural career.

(iv) Research and Development

The study distinguishes between "training," which provides information and skills toward performing an existing job better, and "research and development," which addresses the core issues of the quality of the artistic product and the creation of new ideas. Research and development for the cultural sector may involve courses, travel, independent research and interaction between artists and critics or curators. It is pointed out that around the world research and development costs are jointly shared by the artists and by government (which is parallel to what is the norm for industry).

5.3 RECOMMENDATIONS ON PRIORITIES, PROGRAMMES, INITIATIVES AND ACTIVITIES

The report recommends programmes to expand markets, develop human resources and enhance the quality of Nova Scotia's arts and culture sector.

(i) Market Expansion

The study concludes that market expansion should be the top priority for Nova Scotia's arts and culture sector. It could be the single most effective way of improving arts and culture income, encouraging more full-time employment, training for artists and overall quality of the sector. The report recommends four programmes to expand the market for the sector: development of a cultural tourism strategy; improving facilities; export marketing and cultivating "an export culture."

It identifies five disincentives to market expansion which government should address in order to effectively help the sector in the development of a market expansion strategy:

- **Duties on Export of Crafts**
  Under the Free Trade Agreement tariffs are being phased out over the next 10 years. However, at present craft items exported to the United States do not share in the duty exemptions available to works of art.

- **Border Problems**
  Canadian performers sometimes experience difficulty entering the United States.

- **GST/PST**
  Tourist and convention visitors represent an important form of market expansion for Nova Scotia artists. However, taxes are a serious obstacle to sales to tourists. Therefore, the issue of point of sale rebates is a critical one.

- **Amusement Tax**
  The 10% amusement tax applied to performing arts may make pricing of the Nova Scotia product less competitive to visitors. This tax should be removed from live performances.

- **Lack of Access to Business Financing**
  The ability to obtain financing is key to expansion of the sector into new markets. However, financial institutions are not willing to lend money to market expansion ventures in the culture sector because they are seen as too "high risk." There are no government programmes to provide low cost loans or loan guarantees because projects do not fit into existing "arts" categories or "small business" categories.

(a) Cultural Tourism Strategy

The report states that there is an urgent need to develop a regionally based Cultural Tourism Strategy based on a community development model that will assist the arts and culture sector to expand its markets in relation to tourists to the province. This includes a programme of merchandising cultural products at tourist attractions and historic sites and packaging festivals and events to focus the tourism and cultural and heritage resources of a community or region to create a "destination."

The province's tourism industry needs to acknowledge the role properly marketed arts and culture can play in attracting high-income, high-education tourists to the province and encouraging them to stay longer and spend more money in the province.

(b) Facilities

For certain disciplines within the arts and culture sector, facilities are critical to market expansion; for example, the expansion of the film industry and related crafts may benefit from the development of a soundstage. A feasibility study is recommended to assess this concept.

There is a high proportion of arts and culture workers who create and perform (or exhibit) in non-purpose built space. This lack of purpose-built facilities in such tourist areas as Baddeck impede market expansion. A study should be conducted in conjunction with the cultural tourism strategy to evaluate the need for purpose-built or purpose-renovated structures in terms of economic benefit to the sector.

(c) Export Marketing

The arts and culture sector requires assistance in taking its products to the target export markets, through trade shows, special events and festivals, and in bringing its target export markets to its products, that is, by bringing influential "tastemakers" to visit the province and meet with artists and performers. The report recommends that the "FAM" (familiarization tour) model be used to promote the province's cultural potential to arts journalists, publishers, impresarios and dealers. It suggests that the "art fair" model be studied as a way to make international impresarios and dealers more aware of Nova Scotia's cultural products.

The study identifies the need for a basic "Made in Nova Scotia" label as a marketing tool for the arts and crafts. While the Nova Scotia Designer Crafts Council has a label programme for those who meet its high standards, there is an additional need for a more basic label to help all potential purchasers separate the real "made in Nova Scotia" product and performance from imitators.

(d) Cultivating an "Export Culture"

The report points out that the development of new markets requires sustained effort. It recommends that a partnership be developed including both levels of government, arts and culture organizations, artists and cultural workers interested in export and the "export willing" financial sectors. The government should sponsor annual awards to create awareness of the international export successes of Nova Scotia artists.

(ii) Human Resource Development and Technological Innovation

The study recommends three initiatives to enhance human resource development and technological innovation: designation of centres of excellence, increasing business training for all and advanced technology for those sectors like film and sound production which desire it; and, make mid-career training more accessible throughout the province.

(a) Centres of Excellence

The study points out that specialist training, particularly with respect to new technologies, is not available in Nova Scotia. Because it is unrealistic to suggest that each province can provide for all its training needs in any sector, an alternative is to examine an approach which stresses "Centres of Excellence" wherein certain regions specialize in a particular training area at an international level of excellence, for example, the Banff Centre. In Nova Scotia, the Nova Scotia College of Art and Design (NSCAD) has potential to develop in this direction for the visual arts and crafts. The report recommends studying Cape Breton Island as a location for the development of a performing arts Centre of Excellence that could serve both the cultural industries and tourism. It recommends studying the establishment of a Centre of Excellence for training in "heritage arts," the "heritage industry," and restoration skills at Annapolis Royal.

(b) Business Training

Business training or education in "professional practise" was identified as an important need among the arts and culture sector. At present this type of training is offered only on an extension basis at NSCAD. It is recommended that curriculum be developed for business skills and professional practise as part of all courses of study at NSCAD and through the province's college and university system.

(c) Arts Skills vs. Advanced Technology

The Nova Scotia arts and culture sector values training in skills and techniques above all other types. Only the media arts and sound recording sector shows a keen appreciation of the need for training in advanced technology. It is anticipated that appreciation for advanced technology will increase in other disciplines as market expansion leads to more full-time work in those disciplines. The creation of a film school or film studies programme at NSCAD or another existing institution is recommended as a priority.

(d) Mid-Career Training

The cultural federations are responsible for mid-career training to many of the arts and culture disciplines. It is recommended that a study of the cultural federations be conducted to assess how the training and service role can best be delivered throughout the province; how the various federations can co-ordinate their training efforts and to assess the role of local community arts councils. The report points to the need for a federation or association to serve the music/sound recording industry.

(iii) Quality Development

The culture sector, more than any other sector of the economy, is dependent on quality and the creation of new ideas for its success. In the final analysis, arts and culture is about quality of product, quality of experience, expression and quality of life.

The study makes the case that quality development is crucially linked to improving the opportunity for full-time employment in the arts and culture sector and thus it is linked in a fundamental way to market development and expansion.

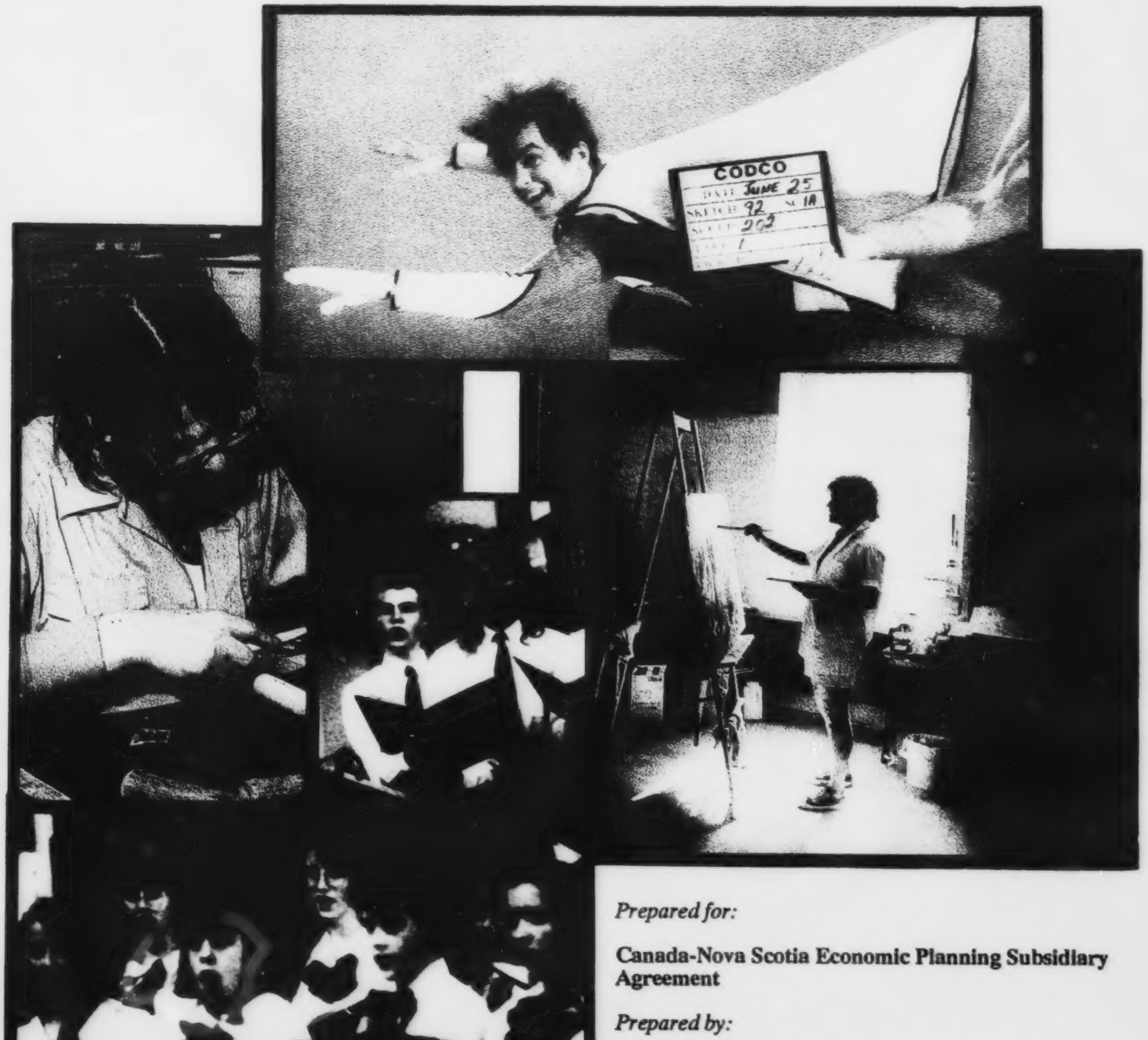
Research and development also plays a critical role in maintaining and improving the quality of arts and culture. Research and development is linked to education, but for the arts it involves such activities as: independent research; travel; cultural exchange at the regional, national and international levels; curatorial visits; experimentation; and criticism by knowledgeable experts in the field. The type of programmes that particularly help to improve quality are: drama festivals; competitions; exchanges with arts organizations elsewhere at a similar level; visiting curators and directors; artists in residence programmes; and curated exhibitions.

The report indicates that governments across Canada and around the world encourage quality development for the arts and culture sector by initiating arts policies and administering programmes through an arm's length agency such as an Arts Council that utilizes a peer review system to prioritize resource allocation.

The report goes on to suggest that an alternative approach to be explored would be the creation of a specific not-for-profit organization to fund research and innovation in the arts and culture sector. This organization or agency could receive funding from a variety of sources such as the Department of Tourism and Culture, the Department of Economic Development and other public and private partners. The purpose of this initiative would be to encourage risk-taking and the creation of new ideas which are otherwise not affordable to individuals and organizations in the arts and culture sector.

LORD Cultural Resources Planning & Management Inc.

NOVA SCOTIA ARTS AND CULTURE SECTOR STUDY



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While the report has been reviewed on behalf of Canada and Nova Scotia, any publication that may be authorized does not signify that the contents reflect the views or policies of either government.

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Artist at work, courtesy of Visual Arts Nova Scotia.
Rotary Youth Choir.
Craftsperson, courtesy of the Nova Scotia Centre for Craft & Design.

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NOVA SCOTIA ARTS AND CULTURE

SECTOR STUDY

TABLE OF CONTENTS

Executive Summary (Separate Document)

1. **Introduction** 1

1.1 Background to and Purpose of Study 1
1.2 Scope and Methodology of Study 3
1.3 Organization of this Report 5

2. **Survey of Individual Artists** 7

2.1 Definitions 7
2.2 Comparisons with Other Studies 8
2.3 Survey Response 9
2.4 Profile of Respondents - Now and in the Future 11
2.5 Arts and Culture Employment 15
2.6 Arts and Culture Income and Expenditures 18
2.7 Non-Arts Income 22
2.8 Arts and Culture Markets 24
2.9 Arts and Culture Facilities 25
2.10 Demographic Information 26
2.11 Opinions and Comments 35

3. **Survey of Arts and Culture Organizations** 41

3.1 About the Organizations 41
3.2 Employees 44
3.3 Volunteers and Members 49
3.4 Markets 50
3.5 Facilities 52
3.6 Finances 52
3.7 Comments and Opinions 54

4 **Focus Groups** 57

4.1 Background 57
4.2 Focus Group Findings 59

5. **Literature Review** 83

5.1 Introduction 83
5.2 National Studies 85
5.3 Provincial Studies 96
5.4 Regional/Municipal Studies 112
5.5 United States Studies 113

6. **Conclusions and Recommendations** 121

6.1 Opportunities and Needs Assessment 121
6.2 Recommendations on Priorities, Programmes, Initiatives and Activities 136
6.3 Summary 144

Appendices

A: Survey of Arts and Culture Individuals Questionnaire 145
B: Survey of Arts and Culture Organizations Questionnaire 153
C: Organizations Which Provided Membership/ Mailing Lists 161
D: Individual Survey Results, By Discipline 163
E: Halifax as Compared to All Other Areas 177
F: Full-Time Compared to Part-Time Artists 191
G: Years Earning Arts and Culture Income 205
H: Organization Survey Results by Organization Type 221
I: Focus Group Participant Lists 235
J: Focus Group Agenda 243
K: Terms of Reference: Arts and Culture Sector Study 245

1. INTRODUCTION

Photo courtesy of the Multicultural Association of Nova Scotia.

1. INTRODUCTION

This chapter sets out the background to, purpose and scope of the study and the methodology used to carry it out. The chapter concludes with an outline of the remaining chapters in this report.

1.1 BACKGROUND TO AND PURPOSE OF STUDY

Recognition of the important role of the arts and culture sector in the provincial economy was clearly expressed in the study's Terms of Reference, dated September 24, 1991.

> *Nova Scotia is blessed with a rich and varied cultural heritage and an active and vibrant cultural community. Culture is an integral part of the lives of the people of the province. Not only does culture enhance the quality of life, it also affects the economy.*
>
> *Indeed, recent economic studies indicate that the arts and culture sector can generate higher than average economic benefits. This is for two reasons: the income produced generally stays within the province where it is generated; and the sector is labour intensive. As a result this sector has higher than average income and employment multipliers. In addition the arts and culture sector provides much needed employment and income in the economy of many communities. The sector's products are of high quality and can be competitive in international markets given the proper backing.*

Having recognized this important role, the federal and provincial governments, in association with the Cultural Federations of Nova Scotia, wished to assess the potential for further economic development within the arts and culture sector. Of particular interest was the extent to which effectiveness and efficiency could be improved through opportunities for human resource development, technological innovation, market expansion and quality development. However, before such opportunities might be explored, an up-to-date and comprehensive data base was required with which to profile the arts and culture sector.

The primary objective of the study was thus to survey individual artists as well as arts and culture organizations with respect to the level and variety of participation in the sector, as well as its basic characteristics in terms of employment, income, markets, skill levels and training, seasonality, location, and other factors. This information is to be used by both levels of government in establishing and evaluating economic development programmes. It is also to be made available to individual artists and cultural organizations, in part to assist them in seeking support from the public and private sectors.

A second objective of the study was to assess the economic opportunities in the various components of the arts and culture sector and the needs for those opportunities to be realized. This would involve the use of focus groups, analysis of the survey data and the relevant experience regarding the arts and culture sector elsewhere in Canada and the United States.

After a competitive bidding process, the firms of LORD Cultural Resources Planning and Management Inc. and Deloitte & Touche Management Consultants were selected to carry out the study.

The principal consultants involved in carrying out the study were as follows:

- Gail Dexter Lord, President, LORD Cultural Resources Planning and Management Inc.
- Paula Gallagher, Principal, Deloitte & Touche Management Consultants.
- Ted Silberberg, Senior Consultant, LORD Cultural Resources Planning and Management Inc.
- Andrea Arbic, Consultant, LORD Cultural Resources Planning and Management Inc.
- Tracey Hoopey, Consultant, Deloitte & Touche Management Consultants.
- Paul Eck, President, Eck Talent Associates.

The consultants worked closely with a Project Team which included:

- Peggy Walt, Cultural Services Officer, Cultural Industries and Research, Nova Scotia Department of Tourism and Culture (Chair).
- Betty MacDonald, Senior Economic Analyst, Atlantic Canada Opportunities Agency.
- Anna Rail, Regional Manager, Cultural Affairs and Broadcasting, Communications Canada.
- Richard Shaffner, Senior Policy Analyst, Nova Scotia Department of Economic Development.
- Jody Wood, Executive Director, Cultural Federations of Nova Scotia.

The consultants acknowledge the valuable assistance of the Project Team in reviewing the survey questionnaires and in providing overall guidance through the study process. The consultants, however, take full responsibility for all conclusions and recommendations contained in this report.

1.2 SCOPE AND METHODOLOGY OF STUDY

The scope of the study was set by the Terms of Reference described above and summarized in terms of providing "*a detailed, reliable information base on the arts and culture sector in Nova Scotia and an assessment of opportunities for development to guide programme planning and development*."

The data generated by the surveys of individual artists and arts and culture organizations has been analyzed in the context of the overall objectives of the study. The survey results, however, may be analyzed and interpreted in many different ways and should thus be available as a data base for use by arts organizations and individual artists.

The scope of this study did not include an analysis of the 1986 Statistics Canada Census data for artists in Nova Scotia or an economic impact analysis. The study also does not provide recommendations on government programmes or funding levels for the arts and culture sector. Rather it provides a base of information and general recommendations upon which decisions regarding such programmes and funding may be based.

1.2.1 Survey Methodology and Response Rates

The first phase of the Nova Scotia Arts and Culture Sector Study consisted of development of a profile of the sector. The profile is intended to provide information on the level and variety of participation in the sector, along with some basic characteristics with respect to incomes, skill levels, markets, and other key factors.

The profile was developed through the conduct of two mail surveys administered by Deloitte & Touche Management Consultants: one of individual artists and one of arts and culture organizations in Nova Scotia. Questionnaires for the two surveys were carefully designed by LORD Cultural Resources Planning and Management Inc. in conjunction with Deloitte & Touche and the Project Team.

The questionnaires were pretested with a small sample of artists and organizations randomly selected by the consultants as well as with several individuals recommended by the Project Team. Appropriate modifications were made to the questionnaires prior to full survey administration. Final versions of the questionnaires were available in French and English. Copies of the English versions of the individual and organization questionnaires are included in Appendices A and B respectively.

The special features of the surveys, relative to national and other surveys which have been conducted in the past, are set out in chapter 2.

The questionnaires were mailed in January and February 1992. A database of individuals and organizations involved in the arts and culture sector was compiled from contacts provided by the Cultural Federations of Nova Scotia and the Nova Scotia Department of Tourism and Culture. Various arts and culture organizations were contacted for their membership/mailing lists. Organizations contacted are listed in Appendix C.

One hundred percent of the individuals and organizations in our database were sent copies of the appropriate questionnaire. In addition, press releases were sent to the media and selected national arts journalists in order to inform the general public and the arts and culture sector in particular about the study. A number of artists then contacted the consultant for copies of the questionnaire.

1.2.2 Focus Group Methodology

The second phase of the study involved focus group sessions with individual artists and representatives of organizations. Focus groups were held over a one-week period in late March - early April, 1992 to discuss some of the preliminary survey data and to identify issues and opportunities for the overall cultural sector and within various disciplines. A total of twelve sessions were held in three communities as illustrated below:

Focus Group Sessions By Community

Halifax

- Crafts
- Film/Sound Recording
- Heritage
- Literary Arts
- Performing Arts
- Visual Arts

Sydney

- Heritage/Literary Arts
- Performing Arts/Film/Sound Recording
- Visual Arts/Crafts

Annapolis Royal

- Heritage
- Performing Arts
- Visual Arts/Crafts

Please see Appendix I for a list of invited focus group participants.

Each focus group was two hours in length and was led by Gail Dexter Lord who was assisted by either Paul Eck or Ted Silberberg. All sessions were attended by Peggy Walt.

1.3 ORGANIZATION OF THIS REPORT

The findings, conclusions and recommendations of this study are presented in six chapters plus appendices.

- This first chapter describes the background to, purpose and scope of the study.
- Chapter 2 details the results of the survey of individual artists.
- Chapter 3 details the results of the survey of Nova Scotia arts and culture organizations.
- Chapter 4 describes the key findings which emerged from the various focus group sessions.
- Chapter 5 summarizes available Canadian and American literature/data on the arts and culture labour force relevant to this study.
- The final chapter presents the conclusions and recommendations which emerged from the study process, with a particular emphasis on opportunities for economic development.
- The appendices include copies of the survey questionnaires, detailed survey results by discipline and various cross-tabulations as well as lists of focus group participants. To assist the reader, the survey responses of Individual Artists detailed in Appendices D through G are numbered to correspond to the numbering of the survey questionnaire in Appendix A. Similarly, the responses of Organizations detailed in Appendix H are numbered to correspond to the numbering in the survey questionnaire in Appendix B.

2. SURVEY OF INDIVIDUAL ARTISTS

Photo from "Dancin' on a Swing" (1987), courtesy of Performing Arts Section, Cultural Affairs Division, Department of Tourism and Culture.

2. SURVEY OF INDIVIDUAL ARTISTS

In this chapter we have summarized the results of the survey of individual artists. We profile respondents based on how they see themselves, now and in the future. We then examine their arts and culture employment, income and expenses, and markets, as well as the facilities in which they create and present their work. The non-arts income of artists is also examined. A demographic profile of artists is then presented. The chapter concludes with a discussion of opinions of artists on various subjects, including artists' vision for the future of the sector.

The Appendices at the end of the report include:

- Survey instruments;
- Tables which detail the results of the survey of individual artists: by discipline; by full-time versus part-time arts and culture activity; by geographic base (Halifax area versus all other areas in Nova Scotia); and by years of earning arts and culture income.

2.1 DEFINITIONS

As will be evident from our literature review in chapter 5, it is apparent that the definitions of "artist," arts and non-arts income, and the parameters of the sector in terms of professional and non-professional artists vary significantly among the national and provincial studies which have been carried out regarding the arts labour force. It is worth briefly describing the considerations of the consultants and the client Project Team in approaching these issues for the Nova Scotia Arts and Culture Sector Study.

The assumptions underlying our approach were:

- that the survey population should be as inclusive as possible reflecting the diversity of Nova Scotia's artists[1] including:
  - full-time and part-time artists;
  - professional and non-professional artists;
  - artists who work in several disciplines.

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[1] In the interests of identifying artists as practitioners of one or more art forms, employment in broadcast media, newspapers and teaching in primary and secondary schools and library work was excluded from the definition of artistic activity. Heritage was included only insofar as it involved non-governmental institutions and their staff.

- that figures on artists' income should be as inclusive as possible by offering numerous categories of arts and non-arts employment;
- that artists themselves should define their status as professional or non-professional and should define what constitutes arts income and non-arts income. It is important to recognize the possibility that what is arts income to one artist may be non-arts income to another (e.g. teaching art classes).

The result is a wealth of information about the diversity of Nova Scotia artists which can be cross-tabulated to provide focused information on particular disciplines and other variables (full time/part time, place of residence, and so on).

Taken as a whole, the findings of this study provide a comprehensive picture of the arts and culture labour force of the province, its needs and its contribution to the province's economy.

2.2 COMPARISONS WITH OTHER STUDIES

In order to assist readers and researchers who may wish to make comparisons between the findings of this Nova Scotia study and those of a recent national survey and an Ontario study, both detailed in chapter 5, we highlight below some differences in how "artists" are defined.

The national survey conducted by Ekos Research Associates Inc, Rethinking The Status of the Artist, (1989) included a survey of creative and performing artists who were members of artists' associations. As acknowledged in the Ekos report, "the sample reflects established professional artists. Neophytes and part-time artists are represented but not as strongly as the more committed, successful artists." Our survey of individual artists in Nova Scotia went beyond established professional, full-time artists to include all types of artists in the literary arts, visual arts, performing arts, crafts, media arts/sound recording and non-governmental individuals in the heritage sector.

A newly released study, Occupation: Artist - A Profile of the Demographic, Economic and Employment Characteristics of Artists in Ontario, prepared for the Ontario Arts Council, drew its definition of "artist" from Statistics Canada's Standard Occupational Classification, 1980. It defines artists as persons whose occupations are concerned with: "creating and executing artistic works by sculpturing, painting, drawing, engraving, etching; creating designs for product and interior decoration; taking photographs, conducting and performing musical works and dances; producing, directing and acting in theatrical, motion picture and broadcast production; writing and other means of informing." This included such occupations as advertising and illustrative designers (17% of 67,000 "artists" identified), product and interior designers (15%), as well as translators and interpreters, photographers and camera operators. The data were from the 1986 Census. The survey population as identified by the Nova Scotia Project Team excluded many of these commercial occupations in order to arrive at a more precise picture of the artistic labour force and its arts and non-arts income.

Many useful comparisons of data can be made between the findings of this Nova Scotia study and the findings of these and other studies discussed in chapter 5. However, researchers and readers must bear in mind the different definitions of the artist and of arts and non-arts income and variations in survey population when making comparisons.

2.3 SURVEY RESPONSE

The response to the survey of individual artists in Nova Scotia is shown in the adjacent table and indicates a survey sample of 670, which represents a response rate of 20% of all questionnaires delivered. This is an acceptable rate for a mail survey, particularly given the length of the questionnaire and the sensitive nature of some of the questions. More importantly, the response rate is a reflection of a decision to give all participants in the sector the maximum opportunity to take part in the study rather than limit the survey to a selected sample of artists. A smaller sample of known artists would have resulted in a higher response rate but would not have provided as clear a picture of the arts and culture sector in Nova Scotia.

	INDIVIDUAL SURVEY
Total Mailed	3,579
Undeliverable	184
Total Delivered	3,395
Total Response	670
Response Rate	20%

It should be noted that the survey response rate of about 20% has been used as the basis for extrapolations to produce data on arts and culture income, expenditures and salaries. Using 20% is quite conservative in that it assumes that the entire population of artists and arts organizations in Nova Scotia were surveyed as part of this study. There are undoubtedly many more artists who were not on the mailing lists. Balanced against this, to some extent, are those who sent questionnaires who were not artists. We believe that using 20% as the basis for the extrapolated figures is very reasonable, if not conservative.

The table below presents a breakdown of questionnaires distributed by discipline as well as the response rates.

DISCIPLINE	DISTRIBUTION	RESPONSE	% RESPONSE
Literary Arts	371	142	38%
Visual Arts	438	162	37%
Performing Arts	2375	241	10%
Crafts	173	55	32%
Media Arts/ Sound Recording	38	22	58%
Heritage	22	5	23%
Other	-	2	-
Unknown[2]	23	41	-

The lowest response rate was among performing artists at 10%. This is likely a reflection of the fact that some 2,375 persons categorized as performing artists were surveyed, a number which went far beyond the Project Team's original lists of artists. Despite the relatively low response rate, the 241 responses are adequate to allow analysis of results. In our judgement, the response is representative of the population, and generalizations can therefore be made from the survey data.

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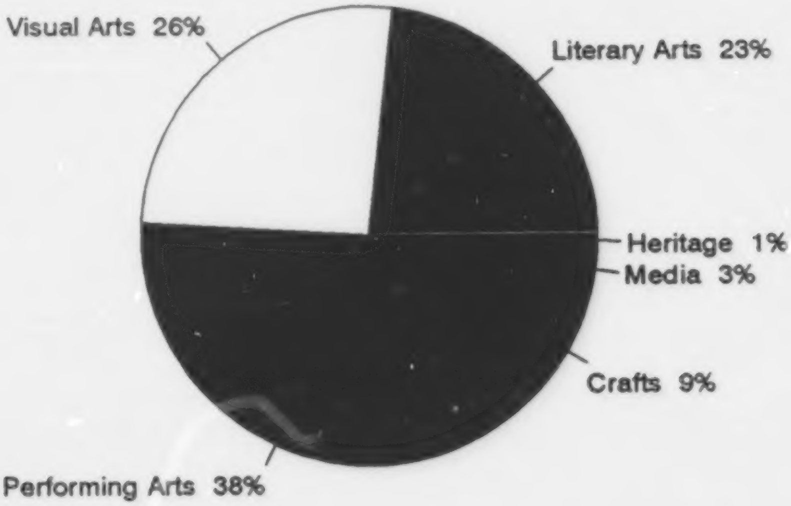
[2] Twenty-three questionnaires were sent to artists upon request following their reading of press releases in local newspapers. At the time of the mailing, the consultants were unable to identify the artist's discipline. Similarly, a number of responses identified more than one main discipline. In 41 cases, the consultant was unable to determine the main discipline; thus the responses were classified as "unknown."

2.4 PROFILE OF RESPONDENTS - NOW AND IN THE FUTURE

2.4.1 Main Discipline

Artists were asked to identify the main discipline by which they define their arts and culture activities within the categories of literary arts, visual arts, performing arts, crafts, media arts/sound recording, heritage, and other. This was difficult for many artists, who see themselves as participating equally in several areas, for example painting, drawing and print-making. Where no response was given for the question regarding main discipline, the consultants exercised judgement, where possible, based on the remainder of the questionnaire, to identify the main discipline.

RESULTS OF INDIVIDUAL SURVEY (%)



Performing artists represented the largest group of respondents (38%). Visual and literary artists also represented major groups, 26% and 23% of respondents, respectively. Crafts, media arts/sound recording and heritage represented significantly smaller groups.[3]

Details of the various disciplines are provided below. Where 20 or more individuals responded in a given discipline, that discipline is broken down further.

---

[3] As specified in the Terms of Reference, festivals, radio, TV, broadcasting, newspapers, teaching art in primary or secondary schools and libraries were excluded from the questionnaire.

2.4.1.1 Performing Arts

Within the Performing Arts discipline, music represented the largest segment, comprising more than two-thirds of the 241 respondents. The relationship of music with other segments of the Performing Arts is shown adjacent.

Segment	%
Music	68%
Theatre	21%
Dance	7%
Other	3%

2.4.1.2 Visual Arts

Of the 162 respondents who listed Visual Arts as their main discipline, seven in ten identified painting as their main activity. The "other" category under Visual Arts included such activities as installation art and graphic design. Details are shown adjacent.

Segment	%
Painting	71%
Other	8%
Print-making	7%
Sculpture	6%
Photography	5%
Drawing	4%

2.4.1.3 Literary Arts

Writing was, by far, the most common segment within the literary arts discipline. Over 90 per cent of literary arts respondents cited writing as their main activity.

Segment	%
Writing	94%
Editing	3%
Publishing	1%
Other	2%

2.4.1.4 Crafts

Fibre crafts was the most common segment within the Crafts discipline. Wood and clay were also quite popular, as shown in the adjacent table.

Segment	%
Fibre	44%
Wood	20%
Clay	16%
Other	15%
Metal	5%

2.4.1.5 Media Arts/Sound Recording

Roughly half of the respondents in the Media Arts/Sound Recording category identified film as their main discipline. The remainder were evenly split between video and sound recording.

2.4.1.6 Heritage

All respondents in the Heritage category identified historical resources excluding government as their main discipline.

2.4.2 Secondary Discipline

In addition to their main disciplines, most artists (72%) identified at least one secondary activity. On average, artists reported being involved in 2.4 secondary activities. In 30% of cases, at least one secondary activity was in the same discipline as the main activity. In particular, the Visual Arts discipline had a large percentage of respondents with secondary activities in the same discipline; e.g. respondents who identified their main discipline as painting and a secondary discipline as drawing.

2.4.3 Perceptions As Professional

The vast majority of artists (73%) consider themselves to be professional. Literary artists are slightly less likely than other artists to consider themselves professional. This assessment calls for personal judgement and does not necessarily relate to deriving income from their art. A number of phone calls and hand written responses to this question indicate that people believe their work to be professional, whether or not they are being paid for it. To illustrate, 14 respondents who consider themselves to be professional derive 0% of their income from their arts and culture activities.[4]

Not surprisingly, full-time artists are significantly more likely to consider themselves to be professional (95%) than are part-time artists (58%). As well, artists are more likely to consider themselves professional if they have been earning income from their arts and culture activity for more than five years.

2.4.4 Type of Work

Over half of the individuals responding to the survey selected "Create works of art, music, literature, craft, etc." as their main type of work. Responses to the other types of work were as follows:

Type of Work	%
Create works of art, music, literature, craft, etc.	54%
Performer	23%
Education, teaching	9%
Other	5%
Administration	4%
Director/conductor	3%
Technician	2%

---

[4] This is consistent with an American study which found that 93% of survey respondents considered themselves professionals even though 52% of those surveyed earned $2,000 or less from their art in 1987. (See section 5.5.3 for summary of study).

A number of respondents had difficulty with this question, when, for example, they create and perform equally. Once again, when no response was provided, the consultant exercised judgement where additional information was available. Otherwise, no response was recorded.

2.4.5 Recognition

The vast majority of survey respondents (86%) have received formal recognition for their arts/cultural activities. This is true in all disciplines. On average, respondents identified 3.1 types of recognition they had received. In reducing order of importance, the following types of recognition were identified:

Reviews in local publications/media	81%
Reviews in regional publications/media	59%
Awards	45%
Acceptance in juried exhibitions	38%
Reviews in national publications	37%
Prizes	19%
Reviews in international publications	17%
Scholarships	10%
Other	8%

Full-time artists are more likely to have received recognition than are part-time artists. Also, the likelihood of receiving recognition increases with the number of years of earning arts and culture income.

2.4.6 Future Plans

With few exceptions, most artists believe their main activity in 1997 will be the same as it is now in 1992. Similarly, they expect to be doing the same type of work in 1997 that they are doing now. The only exception is a few performers who plan to become creators, e.g. a few musicians hope to focus their attention on writing music over the next five years.

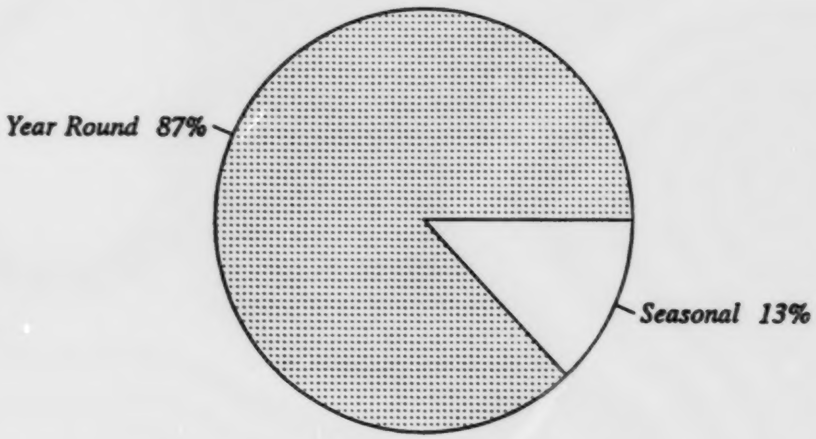
2.5 ARTS AND CULTURE EMPLOYMENT

2.5.1 Year-Round and Seasonal Employment

Some 87% of respondents work year-round in the arts and culture sector. Artists in the performing arts, crafts, and media arts/sound recording disciplines are less likely to work year-round than artists in other disciplines.

Of the 13% of respondents who work on a seasonal basis, the average number of weeks worked in the past year was 25.1. Seasonal workers work most often in winter (77%), followed by fall (66%), spring (61%), then summer (40%). Halifax area artists demonstrate stronger seasonal tendencies than artists residing outside of Halifax, with far fewer working during the summer months.

ARTS AND CULTURE EMPLOYMENT
Year Round vs. Seasonal (%)



2.5.2 Full-Time and Part-Time Employment

Overall, full-time versus part-time employment is roughly split 50/50, with slightly more part-time than full-time workers. However, literary artists and craftspeople are less likely to work full-time than artists in the visual arts, performing arts, or media arts/sound recording disciplines. The average number of hours worked per week on arts and culture activities by part-time workers is 16.1. Part-time workers reported working between one and 60 hours per week.

These findings differ significantly from the Ontario data which showed that 77% of artists are full-time workers. (This figure includes commercial artists excluded from the Nova Scotia Arts and Culture Sector Study). When we look at the number for Ontario "painters, sculptors and related artists" we find that 64% worked full-time (see chapter 5.3.1.1). This compares to 55% of visual artists in Nova Scotia working full-time.

These low levels of full-time arts and culture employment in Nova Scotia point to a potential problem which is discussed in chapter 6.

2.5.3 Self-Employment

Over two-thirds of respondents are self employed or free-lancers with respect to their arts activities. Salaried employees comprise 11% of respondents, while the remaining respondents are split among a number of employment categories. This may be compared to Ontario data[5] that shows 24% of artists are self-employed. The table which follows focuses on arts categories used in the Ontario study which most closely correspond to the definition of artists used in this Nova Scotia Arts and Culture Study. The data confirm a substantially higher percentage of artists in Nova Scotia who were self-employed in 1991 relative to Ontario in 1985.

Self-Employed Artists as a Percentage of Total Artists By Category in Ontario, 1985 Compared to Nova Scotia, 1991

Ontario:	% Self-Employed
Painters, Sculptors, Related Artists	55.0%
Producers, Directors, Performing and Audio-Visual Arts	17.4%
Musicians, Singers	32.7%
Dancers, Choreographers	22.3%
Actors, Actresses	19.6%
Total: Artistic, Literary, Related	23.8%
Nova Scotia:	**% Self-Employed/ Free Lancers**
Literary Arts	74.0%
Visual Arts	82.7%
Performing Arts	63.0%
Crafts	67.9%
Media Arts/Sound Recording	41.0%
Total: Arts and Culture Sector	68.3%

Half of respondents in the Nova Scotia Study also reported at least one secondary employment category. The most frequently mentioned secondary employment category with respect to arts and culture activities is self-employed/free-lancer. Hourly rated employee was a distant second. The remaining employment categories were mentioned infrequently.

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[5] Occupation: Artist - A Profile of the Demographic, Economic and Employment Characteristics of Artists in Ontario, (Ontario Arts Council, 1992) Data are from 1986 Statistics Canada Census. (See chapter 5.3.1.1).

2.5.4 Small Businesses

Eighteen percent of respondents reported owning small businesses in the arts and culture sector. It should be noted that individuals who were identified on our mailing list in relation to a company received the organization questionnaire. Thus the actual number of small business owners in the arts and culture sector is significantly higher than the number reported here. Artists in the crafts (40%), media arts/sound recording (32%) and visual arts (22%) are more likely than others to own businesses.

Full-time artists are significantly more likely to own a small business than are part-time artists. In addition, the likelihood of owning a small business in the arts and culture sector increases with the number of years of earning arts and culture income. However, after 25 years of earning arts and culture income, the likelihood of owning a small business declines.

Only 80 respondents (12%) provided information on their employees. Of the 80 respondents, the majority reported employing people on a part-time basis, most often for support purposes.

2.5.5 Representation

Less than half of respondents (44%) are represented by dealers, publishers, agents, marketing organizations, cooperatives, or some other organization (e.g. gallery, ACTRA). Full-time artists are more likely to have secured representation than are part-time artists. Similarly, artists new to the sector (0 to 5 years earning arts and culture income) are least likely to have secured representation. Not surprisingly, responses differ by discipline, with literary artists being represented by publishers (25%), visual artists by dealers (37%) and performing artists by agents (21%). The difficulty of finding good agents, dealers and publishers was mentioned frequently by artists as an obstacle in tapping new markets.

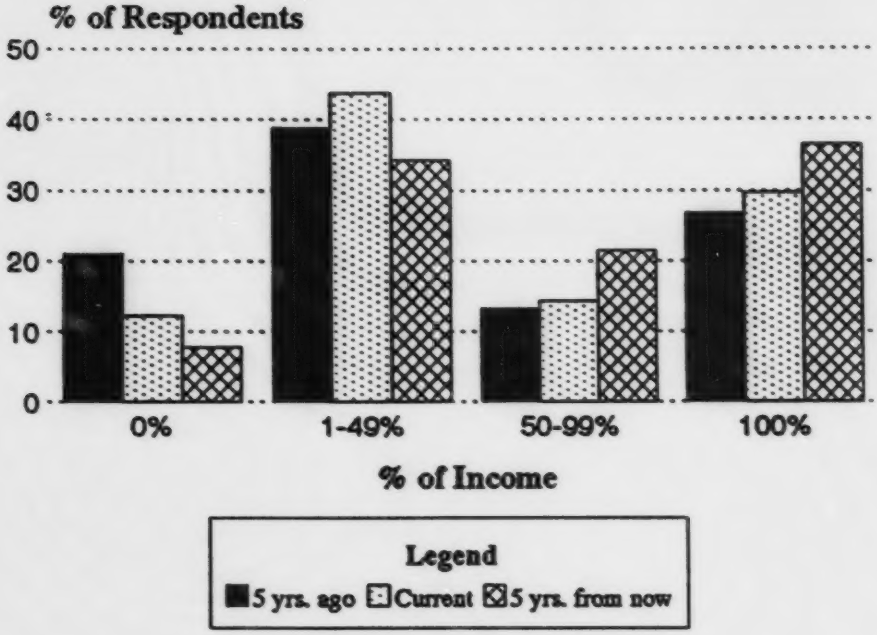
2.6 ARTS AND CULTURE INCOME AND EXPENDITURES

2.6.1 Income

A significant portion of the income of respondents is generated by their arts and culture activities. Individuals are increasingly confident of their ability to derive additional income from these activities.

On average, survey respondents currently derive 46% of their total personal income from their arts and culture activities. This compares with 42% five years ago and an optimistic 59% five years from now. Almost 3/4 (74.4%) of full-time artists derive over 50% percent of their income from arts and culture activities, compared to 18% of part-time artists who derive over 50% of their income from arts and culture activities. As well, the percentage of income earned from arts and culture activities increases significantly with an increase in the number of years of earning arts and culture income.

INCOME FROM ARTS AND CULTURE
Changes Over Time



The trend toward increased income from arts and culture activities is evident in the graph above. By 1997, more than 36% of respondents hope to derive 100% of their income from arts and culture activities, versus less than 30% now. The optimism shown by the respondents reinforces a major finding of Rethinking the Status of the Artist (see chapter 5.2.3) in which over 80% of artists were satisfied with their career choices.

The ability to generate income varies by discipline as shown in the table below (for disciplines with 50 or more respondents).

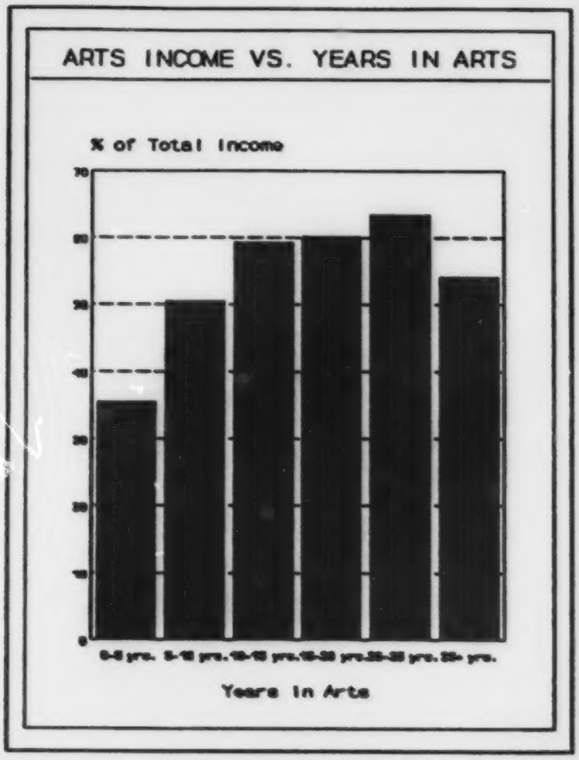
% OF INCOME EARNED FROM ARTS AND CULTURE ACTIVITIES		
Discipline	100% of Income	Less than 10% of Income
Literary Arts	15%	51%
Visual Arts	27%	30%
Performing Arts	38%	31%
Crafts	24%	44%
Media Arts/Sound Recording	59%	9%

Literary artists are least likely to derive 100% of their income from their arts and culture activities, while media/sound recording artists and performing artists are most likely to do so.

% OF INCOME EARNED FROM ARTS AND CULTURE ACTIVITIES		
Activity	100% of Income	Less than 10% of Income
Writing	13%	54%
Painting	21%	37%
Music	37%	32%
Theatre	40%	26%

The patterns shown above have essentially remained unchanged over the past five years. Over the next five years, however, all disciplines expect to derive a greater proportion of their income from their arts and culture activities, with the greatest increases expected by those in the painting and theatre disciplines.

Respondents have been earning income from their arts and culture activities for an average of 14 years, ranging from a high of 50 years to a low of one year. Not surprisingly, income increases with the number of years one has been practicing. As shown in the following graph, as the number of years in the arts increases, so too does the level of income one is able to derive from arts and culture activities. After 25 years in practice, artists tend to slow down and derive less of their income from their arts and culture activities.



The most frequently mentioned sources of arts and culture income were fees (e.g. speaker's fees, readings, teaching fees), mentioned by 41% of respondents, and sales, mentioned by 39% of respondents. Other common sources, in decreasing order, are:

Commissions	27%
Salaries	22%
Royalties/Residuals	21%
Hourly wages	19%
Grants	15%

Sources of arts and culture income vary according to the number of years in which the artist has been earning income from arts and culture activities.

The most financially rewarding source of arts income is sales, identified by 26% of respondents, followed by salaries at 18% and by fees at 16%. Responses differ by discipline, with visual artists and craftspeople generating the bulk of their income from sales, literary artists from fees and royalties, and performing artists from salaries and fees.

2.6.2 Expenditures

The 540 respondents who provided data on expenditures spent an average of $12,500 for their arts and culture activities over the past year. This high level of expenditure is reinforced by Rethinking the Status of the Artist (Ekos, 1989) which reported that artists' work-related expenditures were higher than those of the average worker in Canada. This is likely a reflection of the high percentage of respondents who are self-employed or operators of small businesses. If we assume these 540 respondents are representative of our entire sample of 670, this would result in total expenditures of $8,375,000.

On average, 83% of operating expenditures are purchases within Nova Scotia. If we assume our sample represents 20% of the population of all artists in the Province, and that our sample is representative of the expenditures of all artists as defined by this study, this would represent close to $35 million injected into the Nova Scotia economy for direct purchases of goods by individuals in the arts and culture sector.

When broken down by discipline, performing artists reported average expenditures significantly higher ($18,400) than visual artists ($6,700), craftspeople ($5,800), or literary artists ($5,200). Expenditures are, of course, significantly higher among full-time artists but also Halifax area artists. The most frequently mentioned expense item was supplies, followed by travel, equipment and staff.

2.7 NON-ARTS INCOME

Almost three-quarters of respondents generate some of their income from non-arts sources. Less than 30% of respondents currently derive 100% of their income from arts and culture activities.

Literary artists are most likely and performing artists are least likely to generate non-arts income. The data here are thus generally consistent with the findings of the studies summarized in chapter 5 . For example, Rethinking the Status of the Artist (Ekos, 1989) reported that visual artists and literary artists were more likely to generate non-arts income while performing artists were least likely. The Nova Scotia data indicated, not surprisingly, that part-time artists are more likely to generate non-arts income than are full-time artists. The most common form of non-arts income is professional employment, followed by pension/retirement, and support from family and friends.

A further comparison of the data on non-arts income with the national data which emerged from Rethinking the Status of the Artist (Ekos, 1989) reveals a substantially higher percentage of Nova Scotia artists who earn income from non-arts sources. The Ekos study reported that only 8% of "affiliated artists" surveyed earned income from non-arts sources. The data for Nova Scotia are for all artists, not just affiliated professional artists, and are set out as follows:

	Nova Scotia Arts and Culture Sector Study, 1992 (All Artists)	Rethinking The Status of the Artist, 1989 (Affiliated Artists)
Professional Artists with Non-Arts Employment Income	-	8%
Artists with Non-Arts Professional Employment Income	20%	-
Pension Plan	14%	-
Support from family	13%	11 - 26%
UIC/Welfare	10%	4 - 15%
Government Employee	10%	-
Owner of Non-Arts Business	7%	-
Skilled Trade	7%	-
Retail/Service	7%	-
Farmer	2%	-
Manufacturing	1%	-
Resource Sector	1%	-

The data above also demonstrate the wide range of non-arts fields in which Nova Scotia's artists work.

2.8 ARTS AND CULTURE MARKETS

2.8.1 Current Market

Respondents were asked to identify their current markets or audiences in terms of geographic scope. Unquestionably, the primary market/audience for respondents in all disciplines is residents of Nova Scotia. However, the data also reveal a very significant percentage of artists whose market already extends beyond Nova Scotia and indeed outside Canada.

Market	%
Residents of N.S.	66.8%
Tourists/Visitors to N.S.	12.4%
Rest of Canada	14.1%
United States	4.5%
Other Countries	2.2%

When broken down by discipline, tourists and other visitors to Nova Scotia are a particularly important market for visual artists and crafts people, while the rest of Canada is particularly important for literary artists.

2.8.2 Potential Markets

In terms of future markets for their arts and culture products and services, most artists see various parts of Canada as holding the greatest potential, as shown below. The United States is seen to hold good market potential for nearly four of ten artists.

Potential Market	%
Halifax Area	47%
Nova Scotia	59%
Other Canada	58%
United States	38%
United Kingdom	8%
Europe	11%
Other	6%

When asked to identify help required to reach these markets, the most common form of help named by respondents was financial, in several forms. Artists require financial assistance for travel to shows, training courses and potential markets outside Nova Scotia. Another major need of artists to reach potential markets is help with marketing and promotions. In some cases, the request was for financial assistance for advertising and marketing. In other cases, artists need advice on how best to market their products and enhance their exposure.

Some artists requested financial assistance for their discipline, e.g. "better funding for heritage, museums and cultural resources" or "greater investment in film promotion and distribution and theatre facilities." Another finance-related request is a reduction in taxes payable by artists.

An additional area in which help was requested was in identifying contacts, including finding good agents, publishers and dealers.

One final major area in which assistance was requested was in the general provision of information. For example, artists asked for lists or directories of potential markets, e.g. theatres in New England, new galleries, and international competitions. They also requested information on the requirements of publishers and a central list of agents.

Finally, there were a small number of requests for facility improvements in the province, particularly rehearsal space and publishing facilities.

Overall, artists feel they need a great deal of assistance to tap new markets. They see governments as the major source of that assistance.

2.9 ARTS AND CULTURE FACILITIES

2.9.1 Creation of Work

The most common facility in which work is created is the artist's own or other residence. More than 80% of respondents identified "own/other residence" as a facility in which they create, and fully two-thirds identified it as the type used most often. Not surprisingly, residence is less important to performing artists and media arts/sound recording participants than to artists in other disciplines.

The second most common facility, mentioned by only 36% of respondents, is "purpose-designed gallery, theatre, auditorium." Nineteen percent of respondents chose this option as the type of facility used most often. Full-time artists are more likely to use purpose-designed facilities than are their part-time counterparts. Performing artists were more likely than others to use purpose-designed facilities.

Community spaces were mentioned by 27% of respondents, followed by shared-use facilities at 10%, other at 8% and vacant commercial property at 2%.

2.9.2 Presentation of Work

Artistic work is presented most often in a purpose-designed gallery, theatre or auditorium. Over half of respondents (54%) use purpose-designed spaces, while more than one-third (37%) identified them as the type of facility used most often. Visual artists are most likely to use purpose-designed facilities for presentation of work.

Community spaces are also commonly used to present work. Forty-six percent of respondents use community spaces, and 19% use them more than any other type of facility.

Slightly more than 30% of respondents present their work in their own or other residence. Half of these, or 16%, use residences most often to present their work.

2.10 DEMOGRAPHIC INFORMATION

A demographic profile of respondents is presented in the tables which follow. Where available, a comparison of respondents with the general population of Nova Scotia is provided, based on Statistics Canada data for 1991. This comparison indicates that our respondents resemble the general population of the Province in many respects.

2.10.1 Gender

Survey respondents reflected very closely the population of Nova Scotia segmented by gender, as illustrated below:

Gender	Survey %	Population %
Male	50%	49%
Female	50%	51%

While respondents were, on average, split evenly between males and females, the crafts discipline is heavily skewed to females while the majority of media arts/sound recording respondents are male.

Females are more recent entrants to the arts and culture sector. Only 34% of respondents who have been earning arts and culture income for more than 25 years are female, versus 66% males. However, some 59% of recent entrants (0 to 5 years) are female versus 41% male.

2.10.2 Age

On average, respondents to our survey are older than the general population and the labour force in Nova Scotia, as illustrated below.

Age	Survey %	Nova Scotia Population%[6]	Nova Scotia Labour Force
Under 25 years	5%	19%	20%
25-34 years	17%	22%	29%
35-44 years	34%	19%	27%
45-54 years	23%	13%	16%
55-64 years	12%	10%	8%
65 years or over	9%	16%	-

Survey respondents have resided in Nova Scotia for an average of 26.9 years, ranging from one to 87 years.

2.10.3 County of Residence

The table which follows segments respondents by county of residence.

County of Residence	Survey %	Population %
Halifax	57.4%	36.8%
Cape Breton	7.5%	13.3%
Kings	5.2%	6.3%
Lunenburg	4.9%	5.3%
Annapolis	3.5%	2.6%
Colchester	3.2%	5.3%
Inverness	3.1%	2.4%
Yarmouth	2.6%	3.1%
Antigonish	2.3%	2.1%
Pictou	2.1%	5.5%
Hants	1.8%	4.2%
Digby	1.7%	2.4%
Victoria	1.5%	1.0%
Queens	0.8%	1.4%
Richmond	0.8%	1.3%
Cumberland	0.6%	3.8%
Shelburne	0.6%	1.9%
Guysborough	0.3%	1.3%

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[6] Includes only individuals over 15 years of age, Statistics Canada. Annual Estimate, June 1, 1991.

Respondents in all disciplines are more likely to live in the Halifax area. This is consistent with the findings of the studies reviewed in chapter 5 which showed that artists tend to reside in larger cities. However, an examination of activities by county indicates that musicians are particularly well represented in Cape Breton, while writers are well represented in Kings County.

2.10.4 Highest Level of Formal Education

Level of Education	%
University graduate degree	32%
University undergraduate degree	31%
College courses/trade certificate	21%
High school diploma	14%
Elementary school	2%

Survey respondents represent a well educated group, with 63% having graduated from university (including both graduate and undergraduate degrees). Literary artists in particular tend to have university degrees (73%). For purposes of comparison, only about 11.5% of the Nova Scotia population (over 15 years of age) has a university degree.

The data regarding Nova Scotia's artists are comparable to education levels of artists in other jurisdictions. For example, the Rethinking the Status of the Artist, (Ekos, 1989) reported that 60% of Canadian artists had university degrees. The Ontario study, Occupation: Artist, indicated that 28% of artists had attained university degrees, but this sample includes a large proportion of commercial occupations.

2.10.5 Other Forms of Training

Other Forms of Training	% Mention
Workshops or courses	79%
Self-taught	72%
Apprenticeship/mentor programs	25%
Other	17%

In addition to receiving formal education as described above, almost 80% of respondents have also attended workshops or courses while 25% have participated in an apprenticeship or mentor programme. About 80% of museum employees surveyed for the Museum Labour Force in Canada study (Ekos/Lord, 1989, see chapter 5.2.5 of this report for summary) took at least one development/training course per year.

2.10.6 1991 Personal Income

Total personal income of respondents averaged $27,760[7] in 1991. This is 12% higher than the average income of employed persons in Nova Scotia in 1991, as reported by Statistics Canada.

A comparison of personal incomes by discipline and for various cross-tabulations is presented in the following table. The data indicate that the highest personal incomes are achieved by those in media arts/sound recording, which also includes the highest percentage of males, while craftspeople earned the lowest personal incomes. The crafts field also includes the highest percentage of women. The data here confirm the "gender barrier" reported in the various studies cited in chapter 5.

The data also confirm that income generally increases with experience in the field and that Halifax artists incomes are generally larger than those who reside elsewhere in the province.

The table which follows sets out the average personal income for respondents and the percentage of artists who earn 100% of their income from arts and culture sources.

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[7] Average personal income was calculated using the weighted average method. From the list of income ranges provided in the survey, the mid-point was used for each range. In the case of the < $15,000 and > $90,000 options, $7,500 and $100,000 were used in the calculations. The number of respondents choosing a particular category was multiplied by the respective mid-point. These totals were summed and divided by the total number of responses.

Average Total Personal Income for Respondents, 1991 and % of Artists with 100% of Income from Arts and Culture Sources, Nova Scotia Arts and Culture Study

	Average Income	% Artists @ 100%
TOTAL	$27,760	30%
By Discipline:		
Literary Arts	$19,698	15%
Visual Arts	$24,364	27%
Performing Arts	$30,276	38%
Crafts	$17,057	24%
Media Arts/Sound Recording	$32,200	59%
By Employment Status:		
Full-Time	$26,647	54%
Part-Time	$28,411	8%
By Years Earning Arts and Culture Income		
0-5	$26,316	14%
5-10	$23,453	29%
10-25	$28,541	41%
25+	$40,766	42%
By Residence		
Halifax Area	$29,437	32%
Non-Halifax	$25,611	27%

That the total personal income of Nova Scotia artists ($27,760 in 1991) was not lower but rather 12% higher than the average personal income of employed persons in the province is consistent with the findings of the 1989 Ekos study, Rethinking the Status of the Artist which found that artists' mean employment incomes are comparable to those of the average employed Canadian. The Ontario Arts Council study, Occupation: Artists, reported that employed artists' incomes in 1985 were only slightly less than the average figure for all persons employed in the Ontario labour market.

A comparison of the survey data for Nova Scotia with 1985 data for Ontario, adjusted to 1991 dollars, reveals higher levels of income for Nova Scotia's artists. The figure for both full and part-time (which is most comparable to the Nova Scotia data) was $16,332 ($21,281 in 1991 dollars) for Ontario painters, sculptors and related artists compared to $24,364 in Nova Scotia; and for actors $18,782 ($24,473 in 1991 dollars) compared to Nova Scotia performing artists at $30,276. This may be explained, in large part, by the fact that relatively few of Nova Scotia's artists earn all of their income from their arts and culture activities. It may be seen from the previous table that the percentage of Nova Scotia artists in the disciplines which are compared who earn 100% of their personal income from their arts and culture activities is low, i.e., 27% for visual artists, and 38% for performing artists. This issue is discussed further in chapter 6.

The table below shows that largest proportion of respondents (32%) reported total arts and non-arts income of less than $15,000. Visual artists and crafts people in particular reported low personal (as opposed to household) income. Over 60% of respondents reported income of $30,000 or less. Only 8% reported personal income in excess of $60,000 and ten respondents, or less than 2% of our sample, reported income of over $90,000. In the middle income categories, from $15,000 to $45,000, there is a higher percentage of full-time artists relative to part-time artists. However, for the small number of respondents in higher income categories, from $45,000 to $90,000+, part-time artists are somewhat more numerous than full-time (22% vs. 15%). It should be noted that 81% of all artists both full-time and part-time earn $45,000 and less.

The table shows the percentage of artists who fall into each income category by (column 1) the entire sector (2) part-time (3) full-time (columns 4-8) by discipline.

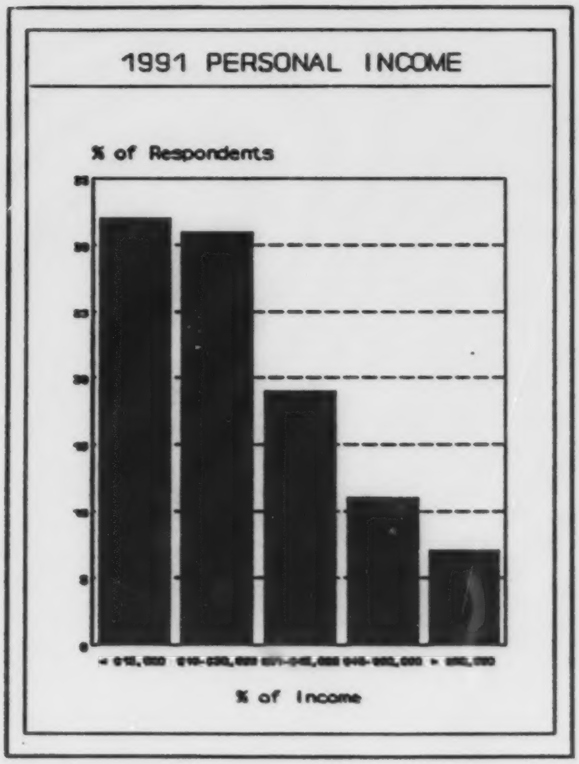
Percentage of Respondents in Each Income Band by Full-time/Part-time and by Discipline

1991 Total Income %	Average Artist	Part-Time	Full-Time	Literary	Visual	Performing	Crafts	Media
<$15,000	31.7%	35.4%	27.9%	31.4%	40.8%	22.4%	58.1%	9.1%
$15,000-$25,000	22.6%	19.8%	26.5%	24.8%	23.2%	25.0%	11.8%	31.8%
$25,000-$35,000	15.3%	12.1%	19.2%	11.7%	10.9%	19.7%	17.6%	13.7%
$35,000-$45,000	11.5%	10.8%	11.1%	6.7%	10.9%	14.5%	4.0%	27.3%
$45,000-$90,000+	18.9%	21.9%	15.4%	24.9%	14.4%	18.4%	7.8%	18.2%

The income differential between Halifax area and non-Halifax artists is not as great as might be expected. While a higher proportion of non-Halifax artists earn less than $15,000 (36% as opposed to 28% for Halifax area artists), all but the highest income bands are comparable:

1991 Total Income	Halifax Area	Non-Halifax
<$15,000	28.3%	36.0%
$15,000-$25,000	22.8%	22.6%
$25,000-$35,000	16.6%	13.5%
$35,000-$45,000	11.2%	12.1%
$45,000-$90,000+	21.1%	16.0%

There is only slightly more full-time arts employment in the Halifax area (49%) than in the rest of the province (47%).



Whether artists' incomes are higher or slightly lower than provincial or national averages is very much related to the definition of the artist. The Ekos survey was of professional artists whereas the Ontario Arts Council study was based on the much wider Statistics Canada definition.

An important point in considering the data is that comparison of artists' incomes to those of the overall labour force may not be fully appropriate. Given the high levels of educational attainment of artists, a more valid comparison may be to others of similar educational attainment, who would generally be in much higher professional income categories than the provincial average.

2.10.7 Contribution to Nova Scotia Economy

Relating total personal income to arts income, our sample respondents (i.e. the 635 individuals who responded to the personal income question) derived a total of approximately $8,100,000 from their arts and culture activities. If we assume that respondents were representative of the entire sample of 670, this would result in total income of over $8,500,000. If we further assume that our sample represents 20% of all artists in the province, and that our sample is representative of all artists as defined by this study, approximately $43 million in gross income can be assumed to have been generated by artists in Nova Scotia in 1991 through their arts and culture activities.

2.10.8 Benefits

Less than half of respondents reported coverage by any of the following: UIC, CPP, Workers Compensation, Medical Insurance, Disability Insurance, Life Insurance, or Pension Plan/RRSP. Of those receiving benefit coverage, the most common benefits include CPP (48%), medical insurance (48%), and UIC (40%). Overall, only 14% of those receiving coverage are covered through their arts and culture activities. This is consistent with a major finding of The Status of the Artist (Task Force, 1986, see chapter 5.2.6 of this report for summary) which reported that few artists enjoy the "safety nets" to which most Canadians have access.

Artists in the performing arts and media arts/sound recording disciplines are most likely to be covered through their arts and culture activities.

2.10.9 Ethnic or Cultural Group

With the exception of Inuit/Eskimo, all 15 ethnic or cultural groups listed on our questionnaire were represented by one or more respondents. English represented the largest group, 63% of respondents, followed by Scottish (33%), then Irish (18%) and French, which included Acadian (17%). (Percentages add to more than 100%, since respondents could select as many options as applied to them).

2.10.10 Affiliation With Organizations

The vast majority (92%) of respondents are affiliated with one or more arts organizations, unions, or associations, either inside or outside Nova Scotia. On average, respondents reported belonging to two such organizations. Three organizations represented the largest group of respondents:

Writers Federation of Nova Scotia	23%
Visual Arts Nova Scotia	23%
Atlantic Federation of Musicians	22%

In addition to the options provided, almost half of respondents reported belonging to organizations not listed on our questionnaire. More than 100 "other" arts and culture organizations were mentioned, including international (e.g. Scottish Official Board of Highland Dancing), national (e.g. Writers' Union of Canada), regional (e.g. Atlantic Canada Composers Association), provincial (e.g. Rug Hooking Guild of Nova Scotia) and local organizations (e.g. Yarmouth Art Society). The most common "other" responses were:

- Canadian Artist's Representation (CARFAC);
- Society of Composers, Authors and Music Publishers of Canada (SOCAN);
- Nova Scotia Printmakers Association; and
- Art Gallery of Nova Scotia.

2.11 OPINIONS AND COMMENTS

2.11.1 Opinions

Some interesting attitudes of artists are evident in the following survey results. Artists were asked to agree of disagree with the following statements:

STATEMENT	AGREE STRONGLY		NEUTRAL	DISAGREE STRONGLY	
	5	4	3	2	1
The opportunity to do my own artistic/cultural work is important to me.	82%	11%	6%	-	-
There are few opportunities for me to advance my career in arts and culture in Nova Scotia.	20%	25%	28%	17%	10%
I am frequently frustrated by the need to earn additional income through non-arts employment.	28%	15%	28%	10%	19%
Given the choice again I would choose to live and work in Nova Scotia.	61%	18%	12%	5%	4%
My ability to earn income from arts and cultural activities would be enhanced by training.	19%	27%	31%	13%	11%
I feel that I am part of a community that values arts and cultural activities.	24%	28%	19%	18%	11%

Artists feel very strongly that the opportunity to do their "own" work is important to them, reflecting a strong sense of independence among artists. They also agree, with few exceptions, that Nova Scotia is their preferred location to live and work. There was far less agreement on the remaining statements.

The issue of whether there are opportunities for advancement in Nova Scotia clearly differs by artist. Artists in the performing arts and media arts/sound recording disciplines tend to agree most strongly with the statement, "There are few opportunities for me to advance my career in arts and culture in Nova Scotia." Remaining respondents are almost evenly split between agreement, disagreement, and no opinion.

Similarly, there was no consensus on whether artists are frustrated by the need to undertake non-arts employment to earn additional income. Visual artists tend to express the strongest level of agreement, or frustration. Overall, respondents were slightly more likely to agree with this statement than to disagree.

Most artists feel that they are part of a community that values arts and culture activities. Many respondents supplemented their response with comments regarding the fact that there is a small community that values their work; however, this does not apply to the community at large.

Perceptions regarding the role of training also differ by artist. The largest group of respondents (31%) were neutral on the issue of enhancing their income from arts and culture activities through training. However, more respondents agreed than disagreed that training would be an asset. Within disciplines, performing artists agreed most often that training would enhance their ability to earn income. Most respondents (54%) prefer training in the areas of arts skills/techniques over business training or training in advanced technology in their discipline. Focus group participants, (see chapter 4), tended to identify business training as well as training on advanced technology as more important.

When asked if training was available in an acceptable format and price, respondents had mixed views. Some said yes, many said "don't know;" the majority said "no." In particular, they find the price of training to be prohibitive. A very common comment was, "available, but can't afford the cost." For some highly advanced technical training, respondents believe it is not available in the Province at any price. Examples include advanced technology training in sound recording, musical illustration/computer graphics, design training, museum studies, and advanced writing. In these cases, artists report having to travel to Central or Western Canada, the U.S., the U.K., or Europe.

Another key problem identified by respondents is that the majority of training is centred in Halifax. For those outside the Halifax area, the time and cost associated with travelling to training sessions restrict the opportunities for attendance.

2.11.2 Comments

When asked about their vision for their future career in the arts and culture sector in Nova Scotia, and what help they needed to achieve their vision, most respondents provided lengthy, thoughtful answers. Many of the responses were somewhat negative, ranging from resignation to desperation. However, a number of artists simply want to achieve greater recognition for their work, and see increased personal effort as the only requirement.

Many artists wrote at length about their personal goals and desires regarding their art. A great deal of passion was exhibited. Illustrations of their vision are as follows:

- To publish a book;
- To be able to spend more time creating instead of working to pay the bills;
- To return to my first love, painting;
- To produce my own compact disc and sell enough to make money;
- To continue to paint as long as my health permits;
- To make some money with my talent;
- To create a comic company with a strong Canadian identity;
- To become an accomplished and sought after writer;
- To retire and paint;
- To operate a community museum.

In many cases, artists believe they must help themselves, e.g. "I need to make my own name." Others stress the need for financial assistance from the government. Examples include:

- I need government support to achieve my dream;
- Finance is the largest obstacle to dedicating time to writing;
- WE NEED GOVERNMENT ACTION IN THE ARTS;
- Without federal and provincial government help, the sector is doomed.

Other illustrations of financial constraints of artists are as follows:

- Money is not a major concern, however, being able to feed oneself while pursuing one's passion (writing) is a nice (if unrealistic) ideal;
- Freedom from financial stress to enable more contemplation for works of greater depth;
- To achieve a level of financial security and independence while working less at other things.

Other assistance required by artists includes:

- Encourage publishing houses to publish local and regional authors;
- Help is needed to get the rest of Canada to take seriously Nova Scotia artists;
- Actors need a revised and revived provincial organization...why Film NS? Why not promote TV and stage as well?

Many artists believe little more can be achieved in the arts and culture sector in Nova Scotia until greater value and emphasis are placed on the arts by the public, government and business. Greater support, recognition and awareness are required from all parties, starting with the education system. In some cases, artists expressed concern for the sector in general; in other cases, they were concerned about their particular discipline. Illustrative comments from respondents are as follows:

- The general Nova Scotia population is totally illiterate in the arts...need more education at the elementary and high school levels;
- Public must become more aware of culture;
- Everyone must be aware of the value of culture - not only economically, but for spiritual, mental and physical well-being of all;
- Need to have people value art;
- Need more media attention;
- The film industry needs active support from the business and government sectors;
- More government and educational support for classical musicians as opposed to the folk-pop-rock entertainment sector;
- Must change people's attitudes about the monetary value of arts and crafts;
- Help change our public's perception that only big budget theatre is worth the price of admission...theatre is all but dead here;
- Funding in theatre is pathetically inadequate; we desperately need performance space;
- Need recognition by the Department of Tourism and Culture as to the value of artists via grant awards in parity with Manitoba and Ontario;
- Outlook is GRIM. We need more government support for high economic impact arts organization such as Symphony Nova Scotia and Neptune Theatre...the public must be made aware of what these resources mean to the community;

Absolutely essential that the provincial government makes a stronger financial commitment to the arts - not just in the realm of marketing but as an essential part of society...plus the Department of Education must make a stronger commitment to arts education.

A number of artists expressed disappointment and pessimism regarding the arts and culture sector in Nova Scotia, and plan, unfortunately, to move. Examples include:

- Moving out west in 1993 where employment in an arts environment will be possible;
- If sales of work are not high enough, I will move out of the province to a more receptive environment;
- Limited opportunity here, eventually I must move;
- No future...no support from the community or the province...I will leave as soon as possible;
- After 12 years I am leaving Nova Scotia because there is no future in the arts here;
- To derive income from my craft (writing) I will have to leave Nova Scotia or travel extensively;
- Plan to leave Nova Scotia...poor access to galleries in Halifax.

Many blame the economy for what they describe as the sad state of the arts and culture sector in Nova Scotia:

- With the economy at a stand still, the art scene is a mess. I'm thankful my livelihood doesn't depend on sales totally. I'd be a pauper!;
- Opportunities are limited, due to economic times.

Illustrations of other criticisms presented by artists include:

- Don't want help because there are always strings attached when dealing with government...too bureaucratic...also, artist run grants are bullshit as well because NSCAD has its own old boys club;
- I would say that my credibility outside the province is linked to the national standing of the Art Gallery of NS. When Diana Niemeroff can come to Nova Scotia without feeling that she is slumming or doing somebody favours, I will no longer list my address on my resume under the heading 'handicap';
- Nova Scotia is a dead market and will continue to be - unless you are in the craft sector or singing bloody Cape Breton mining songs;
- Difficulty for artists to find the time to spend countless unpaid hours on volunteer boards; therefore, a lot of policy making bodies do not benefit from the vital input of the working artist.

Several artists provided specific recommendations to improve the arts and culture sector in Nova Scotia. Examples are provided below.

- Fund an Arts Board;
- Do something about the Canada Council requirements!;
- Need a no cost area where arts and crafts could be displayed on a rotational basis throughout the year;
- Need an out-reach programme by the Nova Scotia College of Art and Design (model: Emily Carr School in British Columbia);
- Promotions - how about a mythical character - like Santa Claus all year round, for the arts;
- Need an arms length provincial arts awards system;
- Nice if Minister of Tourism and Culture could become Minister of Culture and Tourism for one day each year;
- Nova Scotia Arts Advisory recommendation to establish peer juries needs to be monitored very closely...peer juries can easily become political and could create more harm than good;
- Need workshops in self-promotion in Port Hawksbury area.

In summary, artists clearly feel strongly about the arts and culture sector in Nova Scotia. There is a strong desire by artists to devote more of their time to their first love; however, financial constraints usually make it impossible. They obviously feel the industry is in need of much assistance, and see governments playing a major role in overcoming the barriers to growth in the sector.

3. SURVEY OF ARTS/CULTURE ORGANIZATIONS

Photo from "Dancin' on a Swing" (1987), courtesy of Performing Arts Section, Cultural Affairs Division, Department of Tourism and Culture.

3. SURVEY OF ARTS AND CULTURE ORGANIZATIONS

In this chapter, in a form consistent with the previous chapter, we have summarized the results of the survey of arts and culture organizations. Detailed survey results, including comparisons of organization types, are presented in Appendix H.

3.1 ABOUT THE ORGANIZATIONS

3.1.1 Description

A total of 187 arts and culture organizations in the province responded to our survey, which represents about 18% of all questionnaires delivered. Respondents were fairly evenly distributed among the following types of organizations, into which they were asked to categorize themselves:

	ORGANIZATION SURVEY
Total Mailed	1,081
Undeliverable	19
Total Delivered	1,062
Total Response	187
Response Rate	18%

Amateur not-for-profit organization providing product to consumers/audiences	34%
Professional not-for profit organization providing product to consumers/audiences	24%
Service organization (not providing product directly to consumers/audiences)	23%
For-profit companies	18%

Responding organizations have existed for an average of 19.1 years, ranging from one to 153 years.

Fully two-thirds of responding organizations are governed by a Board of Directors/Trustees. Excluding for-profit companies, about three-quarters of responding organizations are governed by a Board of Directors/Trustees.

3.1.2 Main and Secondary Activities

Organizations were asked to identify the main discipline by which they define their arts and culture activities within the categories of literary arts, visual arts, performing arts, crafts, media arts/sound recording, heritage, and other. The most common responses were the performing arts (37%) and heritage (21%) disciplines. Within disciplines, the most common arts and culture activities of organizations include music (26%) and historical resources excluding government (17%). A distant third was painting at 9%, followed closely by theatre at 8%. The remaining responses were distributed among roughly 20 other activities.

A summary of main activities of responding organizations, by discipline, is as follows:

Main Discipline	%
Performing Arts	37%
Heritage	21%
Visual Arts	14%
Crafts	12%
Literary Arts	8%
Media Arts/Sound Recording	4%
Other	4%

No significant changes in main disciplines are expected over the next five years.

In addition to their main disciplines, many organizations (47%) identified at least one secondary activity in which the organization is involved. On average, these organizations report participation in 1.7 secondary activities. In 63% of cases, the secondary activity is in the same discipline as the organization's main activity. For instance, organizations reporting their main activity as dance within the performing arts discipline might also list theatre or music as secondary activities of the organization.

3.1.3 Geographic Base

The geographic base served by responding organizations ranged from international to community, in the following order:

Geographic Base	%
Provincial	24%
International	22%
Community	17%
Atlantic Region	15%
County	15%
National	8%

For-profit companies were most likely to refer to an international (66%) and national (16%) geographic base.

With the exception of Queens and Richmond counties, all counties in Nova Scotia were represented by responding organizations. The breakdown of organizations' headquarters, by county, is as follows, with Halifax as the primary headquarters:

County	%
Halifax	44.1%
Lunenburg	7.0%
Digby	5.9%
Cape Breton	5.4%
Colchester	4.3%
Cumberland	4.3%
Antigonish	3.8%
Kings	3.8%
Pictou	3.8%
Inverness	3.2%
Victoria	3.2%
Shelburne	2.7%
Yarmouth	2.7%
Annapolis	2.1%
Hants	2.1%
Guysborough	1.6%
Queens	-
Richmond	-

3.1.4 Membership

Almost two-thirds (63%) of responding organizations reported that they, or their employees, are members of a union, organization or professional association. A sample list of 16 organizations was provided on the questionnaire with the largest response from members of the Federation of Nova Scotian Heritage, followed by the Atlantic Federation of Musicians and the Nova Scotia Designer Crafts Council. More respondents are members of "other" organizations/associations than any single specific organization or association listed on the questionnaire. Roughly 70 "other" organizations were mentioned by respondents. Only a few of these organizations were identified by more than one or two respondents, namely:

- Canadian Society of Fundraising Executives
- Genealogical Association of Nova Scotia
- Canadian Museum Association

Dance-related organizations such as Royal Scottish Country Dance Society, Royal Academy of Dancing, and Canadian Dance Teachers Association, were commonly mentioned, as were craft organizations such as Craft Councils in Ontario, New Brunswick, Prince Edward Island, and Newfoundland, Cape Breton Home Crafters' Guild, and Canadian Society of Creative Leathercraft.

Professional not-for-profit organizations were the most likely and amateur not-for-profit organizations the least likely to be members of associations.

3.2 EMPLOYEES

3.2.1 Description

Employment within responding organizations has changed significantly over the last five years and is expected to continue changing over the next five years. The table which follows presents the average current number of employees of respondent organizations as well as those of five years ago and projections for five years into the future. The data are for all organizations combined as well as by type of organization.

Among the most significant findings of the research are the following points:

- The average cultural organization in Nova Scotia employs a total of about seven employees, of which more are seasonal and part-time than are full-time, year round.

- The average cultural organization employs 1.17 full-time, year-round employees, only slightly higher than five years ago. However, arts organizations project that the number of full-time, year-round employees will double within five years. Looked at another way, full-time year-round employees account for less than 17% of all current employees in arts and culture organizations in Nova Scotia. This compares to about 19% five years ago. However, these organizations project that about 28% of their employees will be full-time, year-round five years from now. The highest current ratio of full-time, year-round employees to total employees is among For Profit Companies (30%) with the lowest ratio among Service Organizations (12%).

- Contract employees currently account for over 43% of all employees for the average cultural organization. This compares to 46% five years ago with a projected drop to 38% five years from now. The highest current ratio of contract employees to total employees is among Service Organizations (51%) with the lowest ratio among Amateur Not For Profits (16%).

- Full-time seasonal employment has increased slightly over the last five years and is projected to continue to do so for all organization types. Full-time, seasonal employees currently account for over 21% of all employees of Nova Scotia cultural organizations, compared to 19% five years ago and a projected 20% five years from now. Part-time, seasonal employment is not expected to be as significant five years from now among all organization types. It currently accounts for about 12% of all employees of responding arts and cultural organizations, with a projected decline to about 9% in five years, which is the level reported for five years ago.

- Part-time, year-round employees represent about 7% of the total employees of all organization types. Five years ago they accounted for 5% but are projected to grow to 9% within five years.

- While the total average number of employees for all respondent organization types has increased over the past five years and is expected to continue to do so, the average number of employees of For Profit Companies declined and is not projected to reach the levels of five years ago.

- Organizations in the Professional Not For Profit Sector include the largest average numbers of employees (nearly 17) whereas Amateur Not For Profits (just over one) include the smallest average numbers, with Service Organizations (nearly 6) and For Profit Companies (over 6) in between.

AVERAGE NUMBER OF EMPLOYEES PER ORGANIZATION, BY ORGANIZATION TYPE

	TOTAL N=187	FOR PROFIT COMPANY[1] N=33	PROFESSIONAL NOT FOR PROFIT N=44	AMATEUR NOT FOR PROFIT ORGANIZATION[2] N=62	SERVICE ORGANIZATION N=42
Current					
. Percent Providing Data	85%	91%	88%	81%	84%
. Full-Time Year Round	1.17	1.94	2.38	.20	.68
. Part-Time Year Round	.47	.71	.65	.14	.57
. Full-Time Seasonal	1.50	.42	4.74	.22	.95
. Part-Time Seasonal	.84	.42	1.92	.51	.57
. Contract	3.04	2.97	7.16	.20	2.92
	7.02	6.46	16.85	1.27	5.69
5 Years Ago					
. Percent Providing Data	73%	56%	81%	76%	73%
. Full-Time Year Round	1.14	2.26	2.42	.13	.58
. Part-Time Year Round	.30	.37	.47	.06	.44
. Full-Time Seasonal	1.26	.26	3.82	.17	.78
. Part-Time Seasonal	.57	.37	1.29	.29	.34
. Contract	2.80	5.53	6.15	.15	1.63
	6.07	8.79	14.20	.80	3.77
5 Years From Now					
. Percent Providing Data	75%	79%	71%	75%	77%
. Full-Time Year Round	2.34	3.41	3.20	.45	3.34
. Part-Time Year Round	.40	.67	.40	.13	.56
. Full-Time Seasonal	1.70	.63	5.10	.30	1.50
. Part-Time Seasonal	.78	.56	1.87	.45	.44
. Contract	3.17	2.59	10.70	.23	1.03
	8.39	7.86	21.27	1.56	6.87

Respondents were asked to identify the number of current employees who are female, belong to visible minorities, are under 25 years of age, or are over 50 years of age. Responses are summarized as follows with comparisons by type of organization in Appendix H.

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[1] Excludes two organizations with extraordinarily large numbers of employees.

[2] Many Amateur Not For Profit Organizations have no employees, therefore, the averages here are low for those with employees

Type of Employee	Female		Visible Minority		Under 25 Years		Over 50 Years	
	% Resp.	Ave. # Empl.	% Resp.	Ave. # Empl.	% Resp.	Ave. # Empl.	% Resp.	Ave. # Empl.
Full Time Year Round	59%	2.3	8%	1.9	6%	1.4	26%	2.3
Part Time Year Round	47%	1.3	1%	1.0	12%	1.3	5%	1.3
Full Time Seasonal	46%	6.0	4%	2.0	18%	2.9	6%	3.3
Part Time Seasonal	60%	3.4	7%	1.8	39%	2.7	18%	3.0
Contract	34%	8.1	10%	21.7	11%	6.1	11%	15.2

3.2.2 Salaries and Benefits

Organizations were asked to provide gross salaries in 1991 for full-time employees in management positions, performers/artists and technical staff. A number of respondents misunderstood the question and provided salary figures as totals for the organization. "Management position" was interpreted by some as including artistic directors. Some appeared to include part-time or seasonal employees in their responses. The ranges and average salaries for responding organizations (excluding those providing lump sum data) are as follows:[2]

Position	Salary Range	Average 1991 Salary
Management	$4,000 - $72,000	$24,500
Performers/Artists	$2,000 - $28,000	$13,000
Technical Staff	$1,800 - $50,000	$19,000

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[3] Responses to this question were too few to obtain reliable figures by type of organization.

The average 1991 salary for Performers/Artists as shown above concurs with the findings from our survey of individual artists. Individual artists, the majority of whom were self-employed/free lancers, reported average personal income of $27,760, 46% of which is derived from arts and culture activities, which calculates to roughly $12,800.

Almost half (47%) of responding organizations identified one or more benefit(s) that they provide for their employees. Virtually all of those providing benefits identified Canada Pension Plan (95%) and Unemployment Insurance (91%). The second group of benefits offered included Medical Insurance (47%), Workers Compensation (42%) and Disability Insurance (40%).

Professional not-for-profit organizations were more likely to provide benefits than for-profit companies. Amateur not-for-profit organizations were least likely, reflecting their limited level of staffing.

3.2.3 Education and Training

Over half (53%) of organizations set minimum education/experience requirements for employment. For-profit companies are least likely to set minimum requirements (38%) and service organizations most likely (70%). Specific requirements for various positions are as follows:

- For management personnel, the most common education/experience requirement is university graduation, identified by 37% of respondents. A further 22% require some university while 19% require workshops or courses.

- For technical staff, technical studies specific to the discipline are most important (23%) followed by high school completion (19%), apprenticeship with peer/mentor (15%) and workshops/courses (14%).

- Performers and artists are required to have completed technical studies specific to their discipline (10%), attended workshops/courses (9%), completed apprenticeships with peer/mentor (9%) or earned a professional designation (8%).

Slightly more than two-thirds of respondents provide training opportunities for their staff. For those who do not provide training, the main reason given was "lack of finances," followed by "training not necessary." Of those who do provide training opportunities, attendance at courses/workshops (offered by 77% of respondents) and attendance at conferences (offered by 61% of respondents) are most commonly offered.

For 60% of respondents, all training takes place in Nova Scotia. However, only 40% of the training for professional, not-for-profit companies occurs within the province. Where training does not take place in Nova Scotia, the overwhelming reason was simply the unavailability of required training in the province. A second, less common reason, was travelling outside the province and country to keep up with what is happening in the disciplines.

3.3 VOLUNTEERS AND MEMBERS

3.3.1 Volunteers

Nearly three-quarters of responding organizations operate with volunteers. Excluding for-profit companies, in which only 6.5% operate with volunteers, the figures are close to 90%. The number of volunteers has increased over the past five years and is expected to increase over the next five years as well. This is true for all categories of volunteers, as shown below.

Volunteer Positions	Number of Volunteers					
	5 Years Ago		Current		5 Years From Now	
	% Resp.	Ave. No.	% Resp.	Ave.No	% Resp.	Ave. No.
Board of Directors	40.1%	11.1	52.4%	11.9	48.1%	12.2
Artists/Performers/ Participants	19.3%	45.6	26.2%	48.6	22.5%	60.4
Support Volunteers	23.0%	16.5	35.8%	17.9	31.6%	23.5
Other	11.2%	17.1	16.6%	34.6	6.4%	41.5

Almost two-thirds (64%) of organizations provide training opportunities for their volunteers. Three-quarters of those providing training provide it in-house. Over half allow for attendance at courses/workshops, while one-quarter allow for attendance at conferences by volunteers.

Only four in ten organizations offer any form of appreciation to their volunteers. Professional not-for-profit organizations were most likely to provide various forms of appreciation (56%). Most common were lunches or dinners, followed by tickets to concerts or other special events, and parties specifically for volunteers. Other forms of appreciation, mentioned less frequently, included small gifts (e.g. T-shirts, key rings, mugs) or gift certificates, letters of appreciation, sending volunteers to conferences in other towns or provinces, and reimbursing executive members for travel.

3.3.2 Members

Organizations were asked to provide information on the number of members, with members being defined differently by different types of organizations. For purposes of our survey, choir 'member' referred to a participant, an art gallery or museum "member" referred to an individual, family or corporate supporter, while a "member" of an arts service organization referred to a dues-paying individual.

On the basis of these illustrative definitions, responding organizations reported having an average of 139 members. This compares with 113 five years ago, and a forecast of 233 members five years from now.

3.4 MARKETS

3.4.1 Performances/Exhibitions/Shows

The vast majority (86%) of responding organizations take part in performances/ exhibitions/ shows for the general public. The shows, on average, are spread evenly throughout the year, as shown in the following table.

Season	% Offering Performances
Summer	68%
Fall	72%
Winter	68%
Spring	71%

Nova Scotia residents have always been, and will continue to be, the primary audience/market for the performances/exhibitions/shows participated in by responding organizations. However, the relative importance of Nova Scotia is declining, in favour of markets outside Nova Scotia reached by out-of-province tours by Nova Scotia artists. Visitors to Nova Scotia have consistently represented less than 20% of the market/audience.

Audience/Market	5 Years Ago	Current	5 Years From Now
Nova Scotia Residents	80.3%	75.2%	72.3%
Visitors to Nova Scotia	15.1%	17.8%	17.9%
Outside Nova Scotia	4.6%	7.0%	9.3%

The majority (70%) of organizations believe their total audience/market will increase over the next five years. On average, the market is expected to increase by 85%. Only 3% believe the market will decline. The remaining 27% believe the size of the market in five years will be unchanged from the market of today. Among the types of organizations, the most optimistic were the for-profit companies (87%), followed by professional not-for-profits (85%).

3.4.2 Product Sales

Roughly half of responding organizations sell products to the marketplace. The most commonly sold products are books and publications, followed by logo pins/T-shirts/sweatshirts, and then a range of products including baskets, prints, paintings, and carvings.

Like the primary market figures for performance/exhibitions/shows described above, the main market for organizations' product sales is Nova Scotia. The relative importance of Nova Scotia as the primary market is declining as organizations look to broader geographic areas for product sales. In particular, the "other countries" market is forecast to more than triple from a modest 1.7% five years ago to more than 5% in 1997.

Sales	5 Years Ago	Current	5 Years From Now
Nova Scotia	81.6%	74.5%	67.9%
Other Canada	10.5%	15.1%	17.2%
United States	6.2%	7.9%	9.5%
Other Countries	1.7%	2.5%	5.5%

Seven of ten organizations selling products believe their total sales will increase over the next five years, on average by 84%. Only 3% believe sales will decline, while the remaining 28% believe they will remain the same. The most optimism was expressed by for-profit companies.

3.5 FACILITIES

Responding organizations use different types of facilities for various purposes.

- Office - own/other residence was used by 31% of organizations, followed by rented commercial space (20%) and community space (17%).
- Meeting - community space used most often (35%) followed by own/other residence (23%).
- Production/Performance - community space most often used (32%) followed by rented commercial space (18%) and own/other residence (13%).
- Sales - generated from a variety of facilities including rented commercial space (12%), own/other residence (9%), community space (9%) or own commercial space (8%).

3.6 FINANCES

The 140 responding organizations reported annual expenditures totalling about $19.5 million, or an average of about $139,000 per organization. Respondents were asked to break down operating expenses into identified categories. The percentage of respondents identifying each expense item, the average value of the expense for all respondents, and the weighted average of total operating expenses represented by each expense item is provided as follows.

Expense Item	% of Respondents	Average $	Weighted Average %
Salaries, wages, benefits	56%	$73,074	39.1%
Sales/commissions	19%	36,433	6.6%
Other	44%	36,241	15.2%
Supplies	65%	34,430	21.4%
Advertising/marketing	50%	12,026	5.7%
Equipment	48%	11,137	5.1%
Rent	35%	8,270	2.8%
Travel	50%	6,894	3.3%
Training	30%	2,494	0.7%
			100.0%

While supplies is the most commonly mentioned expense item, the most costly expense, on average, is salaries, wages and benefits at 39% of the total weighted operating expenditures of organizations. In most cultural and heritage institutions in Canada, staffing accounts for from 50% to 70% of total operating expenses.

In order to assess the direct economic impact of the expenditures of arts and culture organizations in Nova Scotia, we have assumed that the average expenditures of the 140 organizations which provided data is representative of the total survey sample of 187 organizations. If so, total expenditures would equal about $26 million, of which over $10 million is spent on salaries, wages and benefits and close to $16 million on other expenditures. If we further assume that our sample represents about 20% of all arts and culture organizations in the province, and that our sample is representative of these organizations, an estimated $51 million is spent on salaries, wages and benefits, all of which remains in Nova Scotia.

Of other operating expenses, estimated at about $79 million, some 88% is spent within Nova Scotia, a total of nearly $70 million. The total **direct** impact of arts and culture organizations on the Nova Scotia economy, combining salaries and other expenditures, is therefore about $121 million.

In addition to operating expenses, respondents also identified their sources of revenue:

Revenue Source	% of Respondents	Average $	Weighted Average %
Federal grants	21%	$72,962	20.2%
Sales of products/services	45%	66,200	39.3%
Provincial grants	39%	37,800	19.4%
Private sector fundraising/ donations	41%	18,900	10.2%
Other self-generated revenue	42%	15,200	8.4%
Municipal/county grants	20%	9,100	2.4%
Total	48%	113,900	100.0%

The most common sources of revenue are federal grants, sales of products/services, provincial grants and private sector fundraising/donations. Although federal grants are the most financially rewarding source, on average, relatively few organizations have access to these grants.

3.7 COMMENTS AND OPINIONS

3.7.1 Vision

Respondents were asked to describe their vision for the future of their organization and to identify help they need to achieve that vision. In describing their vision, many organizations repeated their organization's mission and objectives. In many cases, they wish to continue promoting, developing, and celebrating their respective arts and culture activities.

A large number of responding organizations are hoping to increase their size over the next few years. Promotion was identified as an important vehicle for this, as was better representation. Other large groups looked beyond their organization to the entire sector, and wish to encourage appreciation of arts and culture. Educating youth and having residents of the province more involved in the sector were recommended.

The primary requirement to achieve this vision is financial support for both operating costs and capital projects. A distant second in terms of needs is training, followed by public relations support.

3.7.2 Opportunities

Respondents were generally positive regarding the opportunities in their arts and culture sector. A number described the opportunities as "unlimited," with potential to contribute to sustainable economic development, as well as to enhance the quality of life in Nova Scotia. Opportunities were also identified to have various arts and culture organizations work cooperatively (e.g. co-productions by theatres).

3.7.3 Constraints

The key constraint identified by the vast majority of organizations is lack of funding, and the resulting impact on human resources. Other commonly mentioned constraints include (in decreasing order of frequency of mention):

- lack of reasonably priced facilities
- the economy
- lack of appreciation for the arts and culture sector
- difficulty finding qualified, willing volunteers
- lack of training

The general tone of the organizations in setting out constraints was positive and constructive. There was no sense of complaining or criticizing by responding organizations.

3.7.4 Assistance Required

Responding organizations identified several key areas in which assistance is required. The most frequently mentioned forms of assistance include:

- funding;
- promotion of arts and culture;
- government support; and
- training and expertise.

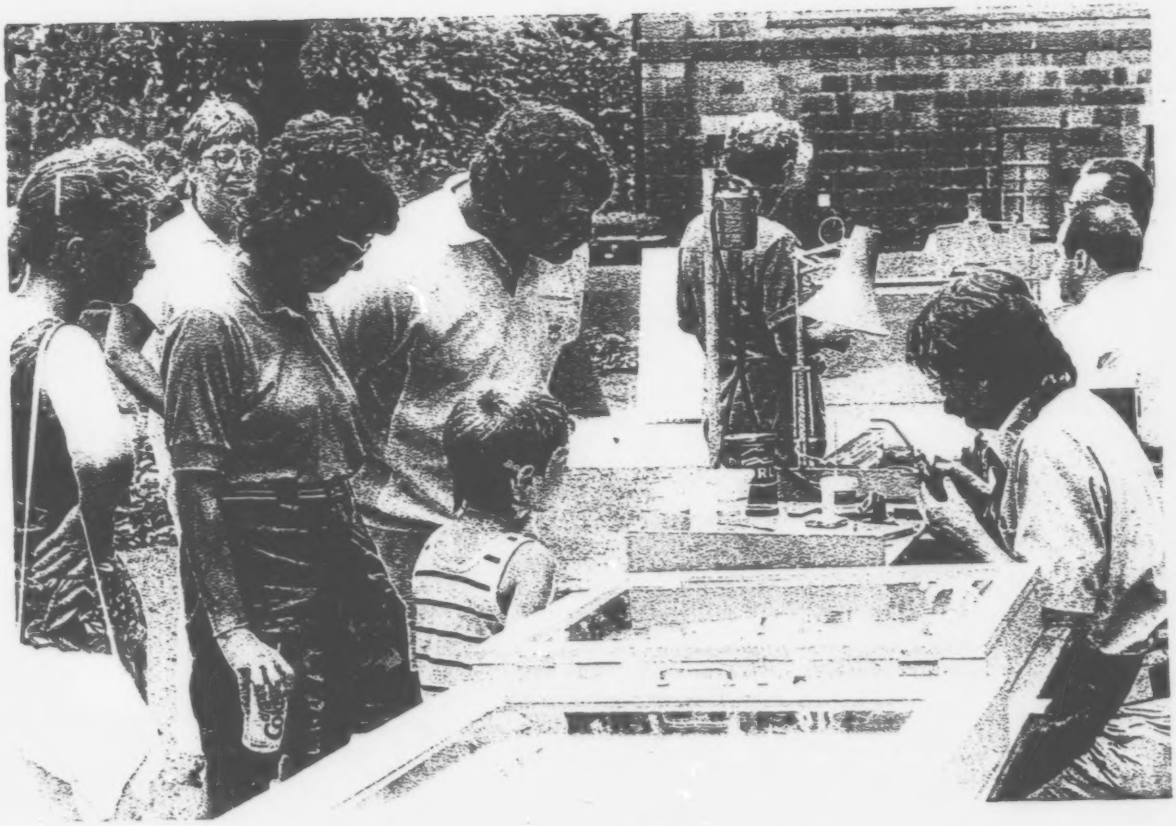
As expressed in the "Constraints" section above, arts and culture organizations seek additional funding for a variety of purposes such as: facilities; staffing/human resource needs; and programming among others.

Interestingly, many responding organizations describe the first three forms of assistance (funding, promotion, government support) as inter-related. Specifically, government support and public sector funding will help to sustain the arts and culture industry. Promotion of the industry is critical to attracting the support of the private sector and the general public, and thus allowing the industry to become self sufficient. This idea is best illustrated by selected comments from two responding organizations:

> "... every effort must continue to be made to inform the general public about the major artistic and financial contribution the arts/culture sector makes to the social fabric and economy of Canada and its individual regions. If this is done properly and effectively, it should lead, in time, to many more people appreciating and supporting the concept of improved public and private funding for the sector."

> "... those people, government and agencies who provide support funding for the sector must be encouraged to appreciate that until artists in all disciplines become financially self-sufficient, they require different levels of assistance as their careers progress. In particular, they need increasing help with the presentation of their work as they become better known and travel more widely and they need help to sustain periods of time devoted exclusively to the production of new work. Support funding decisions should take these requirements into consideration and funding levels should be set accordingly."

4. FOCUS GROUPS



Chris Shute, Metal Arts Guild, demonstrating silver jewellery making at a Nova Scotia Designer Crafts Council Summer Craft Market. Photo by Christine Callaghan, courtesy of Nova Scotia Designer Crafts Council.

4. FOCUS GROUPS

A key element of this study is an assessment of the opportunities in the various components of the arts and culture sector and the needs to be met for those opportunities to be realized.

This assessment is based on three types of research:

- quantitative analysis of the survey data;
- qualitative research through focus group discussions with a sample of artists from each sector and from various regions of the province;
- contextual research both through a review of other studies and through the consultants' experience and knowledge of relevant experience elsewhere.

All three types of research lead to the conclusions and recommendations in chapter 6. Here we present a brief description of the focus group sessions and the key findings which emerged from them.

4.1 BACKGROUND

During the week of March 31, 1992, the consultants facilitated 12 focus group sessions with 75 artists from all sectors included in the study. The list of invited focus group participants is presented in Appendix I. Below are listed the focus group sessions by location:

Halifax:	Heritage Resources (7 participants) Production Crafts (5 participants) Film/Sound Recording (8 participants) Performing Arts (9 participants) Visual Arts (8 participants) Literary Arts (7 participants)
Sydney:	Performing Arts, Film/Sound Recording (6 participants) Visual Arts/Crafts (5 participants) Heritage/Literary Arts (4 participants)
Annapolis Royal:	Visual Arts/Crafts (7 participants) Heritage (4 participants) Performing Arts (5 participants)

4.1.1 Focus Group Methodology

Focus group participants were selected by the Project Team and staff of the Department of Tourism and Culture to reflect the diversity of Nova Scotia's artists. They included individual artists from all sectors, representatives of various associations, union members, co-op members, owners of small businesses, administrators, teachers – the artistic labour force of Nova Scotia.

Each focus group was facilitated by two of the consultants on the team, namely Gail Dexter Lord and either Paul Eck or Ted Silberberg and was observed by Peggy Walt, Chair of the Project Team.

The agenda for each focus group (see Appendix J) included:

- an introduction to the purpose of the Arts and Culture Sector Study and its methodology;
- presentation and discussion of key findings to elicit sectoral evaluation of the meaning of some of the survey data collected;
- discussion of needs and opportunities to develop further the economic viability of the arts and culture sector of Nova Scotia. This included reference to constraints and opportunities associated with human resource development, technological innovation, market expansion and quality development, as well as other related issues;
- discussion of the role of stakeholders in meeting needs and opportunities (stakeholders would include, for example: individual artists, cultural associations, business and government).

Each focus group in each region of the province had a distinct approach. The discussions were lively and informative for the participants as well as the facilitators. It became apparent that many participants were meeting for the first time, and as the discussion progressed, new opportunities for partnerships and cross-overs between artistic disciplines emerged.

Below we describe highlights of each focus group discussion. It must be noted that the statements and recommendations presented in this chapter are those of the focus group participants, which may or may not be reflected in the consultants' conclusions and recommendations, as set out in chapter 6.

4.2 FOCUS GROUP FINDINGS

4.2.1 HERITAGE RESOURCES – HALIFAX

This Heritage Resources focus group included directors and curators of heritage sites, museums, a cultural centre and the Federation of Nova Scotian Heritage – all heritage institutions outside the Nova Scotia Museum Complex. This group reflected the definition of the heritage sector in the survey which excluded "government facilities."

4.2.1.1. Survey Data

The consultants invited participants to comment on the survey data that "about half of all arts and culture employment is part time" in light of their experience.

It was observed that many of these part-time positions are held by women going back to the work force and that "unless they manage their time carefully, they work full time for part time wages." Participants expressed the view that part-time workers (whether in summer or year-round jobs) result in lack of consistency and continuity in performance. On the other hand, it was expressed that pursuing part-time employment was often an effective way to achieve future full-time employment.

4.2.1.2 Economic Viability

Constraints: Participants said that the greatest constraints on improved economic viability of the heritage sector are as follows:

- Lack of a coherent policy framework.
- Uncontrolled proliferation of new museums leading to competition for funding instead of co-ordination and co-operation.

Opportunities for increasing the economic viability of the sector were identified as follows:

- Demographic changes -- people are more educated, the heritage sector has improved and people want to participate in museums and heritage.
- The sector is part of a tourism industry.

Recommendations and Roles of Stakeholders:

- The heritage/museum sector should begin to look at controlled growth -- "how we can manage 35 years of success."
- The sector should begin to re-think how its participants work together. For example, historic sites located in a region could organize open hours to share interpretive staff thereby allowing for improved training and the quality of that staff.
- The Federation of Nova Scotian Heritage should define its role and mandate as providing services, training, education and to lead in advocacy for the heritage sector.
- The tourism side of the Department of Tourism and Culture should focus on funding the activities of the heritage sector that contribute to the tourism industry such as special events and festivals.
- The culture side of the Department should take responsibility for assuring preservation of historic sites and collections.
- Clarification of jurisdiction for museums is needed between the Department of Tourism and Culture and the Department of Education.
- A policy should be developed to address the problem of the province's two kinds of heritage -- small "h" heritage and big "H" -- possibly through a registration scheme that qualifies institutions and sites for funding (by which was meant the dichotomy between government heritage institutions and the independent sector).

4.2.2 PRODUCTION CRAFTS -- HALIFAX

This focus group was comprised of craftspersons including some who also taught at the college/university and workshop levels, one who is a gift shop manager and an executive member of the Nova Scotia Designer Crafts Council.

4.2.2.1 Survey Data

The consultants presented the survey finding that over half the province's artists are "self-employed."

We were told that a 1988 survey by the Nova Scotia Designer Crafts Council indicated that the vast majority of craftspersons in the province are individual entrepreneurs and that there are several large crafts businesses employing 10-15 people. Participants said that people in crafts enjoy working for themselves and have strong personal motivation. There has been a shift away from the co-ops established in the 1960s. There is also a dearth of collectives to share resources. In the last two years craft co-operatives have emerged for the purpose of sales. Several participants pointed out the need to be selling crafts in larger markets: "There is a choice between the local tourist economy and the international economy."

4.2.2.2 Economic Viability

Constraints: The following constraints to the sector's economic viability were discussed:

- We do not teach students at the college level to be entrepreneurs.
- There are trade barriers to marketing crafts internationally. Works of art cross the border duty free, but crafts need special certification.
- The perception, by some craftspeople, that they cannot be "artists" and successful business people at the same time.
- Large craft groups are able to get into export markets but the individual entrepreneur does not seem to be able to move toward those opportunities.

Opportunities:

- The availability of new technology that improves quality and productivity was mentioned as an opportunity for the sector, but not for those who are able to successfully market "hand-crafted" items.
- The Department of Tourism and Culture is involved in marketing and this is very positive.
- The Nova Scotia Designer Crafts Council establishes standards and guidelines.

Recommendations and Roles of Stakeholders:

- Craftspeople need to reconcile the ability to be successful in the crafts field with their self-image as artists.
- Government needs to study the basic definition of craft in the context of the Free Trade Agreement.
- Training in business skills and marketing should be part of crafts education at all levels.
- Government should provide subsidized access to accountants who have expertise in the crafts business.
- The provincial government should establish an intermediary label programme that helps buyers distinguish between crafts made in Nova Scotia from imports.
- An agency should be established to help get goods to market.

4.2.3 FILM/SOUND RECORDING – HALIFAX

Participants included composers, performers, agents, producers, presenters and directors; and among these, business owners, individual artists and members of co-ops.

4.2.3.1 Survey Data

The consultants presented the survey finding that artists expressed optimism about their ability to earn more money from their arts and culture activities in the future. Participants explained that this is indeed an optimistic sector. Five years ago, there wasn't a music industry in Nova Scotia; the myth was encouraged that you had to leave the province to succeed. "There was creativity. Now, we have a cottage industry."

4.2.3.2 Economic Viability

Constraints: Participants said that the greatest constraints on improved economic viability are:

- Lack of a film school in Atlantic Canada.

- Gulf between business and culture -- "there's nowhere for the two to meet."
- Lack of a soundstage and other infrastructure which is key to bringing productions into Nova Scotia and generating income and jobs.
- Lack of knowledge among Halifax banks of film and sound recording industries. It is thus very difficult to obtain business loans at reasonable rates.
- There is no government-assisted federation for cultural industries like film and sound recording.
- Lack of access to film distribution.
- Film/sound recording artists/businesses lack sufficient business knowledge.

Opportunities:

- "An incredible untapped talent pool" of composers and performers in the province.
- "Our main asset is 100 years old -- We have a distinctive sound."
- A loyal local market for Nova Scotia music on which to build.
- The Nova Scotia Film Development Corporation to funnel private investment into film.
- Opportunities for co-production. Canadians are becoming experts in co-productions world-wide and Nova Scotia can benefit from this expertise and profile.
- The Film Co-op provides entry-level jobs in the industry and an important talent pool.
- The recession strengthens the market for this industry -- people rent videos and buy recordings.

Recommendations and Roles of Stakeholders:

- One participant made this statement which echoed the views of many: "I don't want to be subsidized by government; I want to be supported." The role of government should be mainly in guaranteeing loans and assisting the film/sound recording sector to obtain bridge funding from banks.

- Some agency (either government or industry-based such as an arm's length federation with government support) needs to educate the investment community about opportunities in this sector and provide business training to the film/sound recording sector.

- There is a need for government assistance for an arm's length industry association (possibly Music Industry Association of Nova Scotia) which would be parallel to the Cultural and Heritage Federations and which would provide training and services to the industry.

4.2.4 PERFORMING ARTS, FILM/SOUND RECORDING – SYDNEY

This group included performing artists, directors, the manager of a band and producers who had travelled from throughout Cape Breton to attend the focus group session.

4.2.4.1 Survey Data

The consultants presented the finding that today 46% of the total personal income of artists is from arts and culture activities compared to 42% five years ago. One artist commented that it was the decision for her to become a full-time artist that led to her making a larger proportion of her income from theatre. Another participant observed that more salaries are paid through cultural industries than through arts.

4.2.4.2 Economic Viability

Constraints: Participants said that the greatest constraints on improved economic viability are:

- Lack of cultural facilities in which to present. The Centre Bras d'Or, which is the main venue for arts presentation to tourists, is temporary -- a school. There is a need for a small theatre in Sydney.

- For musicians there are only arenas and bars. This limits opportunities to develop original music.

- The need for training. The tourism sector on which the local economy depends receives training. Performing arts in the region is based on local and family traditions but needs training to attain higher standards of presentation, professionalism, management skills, business and new technology.

- Funding is needed to send Cape Breton artists to training centres and universities as programmes are not available locally.

- "We're looked at as small; but treated as big." That is, Cape Breton artists cannot get business development loans because they are "too small" but they must pay business rates for newspaper advertisements and auditorium and hall rentals.

- Almost all funding is based on tourism. "Not everything we do in the theatre is for tourists. Tourists come for entertainment; residents come for education."

- "There are no lawyers here familiar with cultural industries. To make a record deal you have to go to Toronto."

Opportunities:

- "We are a success here. We are a creative community, the old work with the young, we are together."

- In the last five years there has been a tremendous increase in quality of Cape Breton performers. "Ten years ago we were parish oriented; today we are more professional."

Recommendations and Roles of Stakeholders:

- The cultural federations need to be more involved in Cape Breton. "They are not relevant. The Music Industry Association is great."

- Arts Cape Breton is the information/advocacy organization with 100 paying members and 400 subscribers which could fill a broader mandate.

- Centre Bras d'Or needs assistance to become a year-round Centre -- like a "Banff East." It focuses the tourist market for all the arts and could be the centre for training and used by the resident market at other times of the year.

- Government needs to develop balanced policies that address investment in tourism with certain funds, and investment in research and development of the arts with other funds.

4.2.5 HERITAGE AND LITERARY ARTS – SYDNEY

This focus group brought together writers, publishers, a professor and board members of heritage sites.

4.2.5.1 Survey Data

The survey data on part-time versus full-time employment were presented. The group reflected that this was mainly attributable to the seasonal nature of the tourism industry. The relatively low percentage of arts income derived by writers was discussed. Participants attributed this in part to the high mortality rate of Atlantic magazines, high postal rates and low remuneration for short stories and reviews.

4.2.5.2 Economic Viability

Constraints: Participants said that the greatest constraints on improved economic viability are:

- Tourism does not see the heritage underpinning of the tourism sector. There are 25 museums in Cape Breton, but their collections functions are not supported by government (they are not taken seriously by the Department of Education) and tourism does not take a long range view.

- The University College of Cape Breton has not played a community development role.

Opportunities:

- Cape Breton is the most exciting and romantic place for arts and culture - with vivid personalities.

- Enterprise Cape Breton has contributed to local heritage societies but without accountability and a plan.

Recommendations and Roles of Stakeholders:

- The provincial government should develop a policy on the Gaelic language and for funding heritage museums and designated sites.
- The federations should visit Cape Breton and provide more relevant services.
- The University College of Cape Breton could play a greater role in arts training.
- Federal and provincial governments should revise tax policies to recognize voluntary contributions of time. This is important in poorer regions like Cape Breton where people do not have money to contribute – they contribute time.

4.2.6 VISUAL ARTS/CRAFTS – SYDNEY

Participants included wood and textile crafts, painters, the head of a craft school, an arts organization and a co-op.

4.2.6.1 Survey Data

The consultants presented survey data which show that artists believe there are opportunities to market their work outside the province but need government help in accessing these markets. One of the craftpersons present said he sells most of his work outside the province through commissions. He feels there is a big opportunity for export. Another participant said that there is a greater interest in the Gaelic culture of Cape Breton outside the province than there is in Halifax. He observed that there are a number of artists in Cape Breton who work primarily for foreign markets.

4.2.6.2 Economic Viability

Constraints: Participants said that the greatest constraints on improved economic viability are:

- Lack of distribution in Cape Breton. There are no private galleries and no public galleries.

- Island Crafts was successful but it no longer exists.
- The local patronage base is weak as a result of poverty.
- Government leased gift shops have very few Nova Scotia craft items in them.
- The federations based in Halifax are not effective in meeting education, information or training needs of Cape Breton artists.

Opportunities:

- Green tourism and cultural tourism were seen as a tremendous opportunities for the arts in Cape Breton.
- The growth of interest in Gaelic culture world-wide and the Elder Hostel movement present opportunities.
- There is a growing international market for what Cape Breton artists produce.

Recommendations and Roles of Stakeholders:

- Craftspeople need business training in pricing, promotion, packaging and presentation. People in Cape Breton have basic skills. They need training in design so they can be competitive. The University College of Cape Breton has the facilities and some of the expertise to provide training – they have not had the funding. It's more than a matter of money. The provision of training should be community based. The University College and most trainers have the wrong model. They need to ask the community they wish to serve, 'How can we facilitate what you need?' -- i.e. a community development model.
- The province should provide grants for curatorial work -- this helps to improve standards.
- A marketing agent or agency is needed.

4.2.7 VISUAL ARTS – HALIFAX

This focus group included artists, teachers of art at the post-secondary level, an art gallery director, and representatives of Canadian Artists Representation (CARFAC), the Nova Scotia Printmakers' Association and Visual Arts Nova Scotia.

4.2.7.1 Survey Data

The consultants presented survey data that showed that artists were optimistic about the future of arts and culture in Nova Scotia. In discussion, a number of the visual artists observed that this was likely because "the expectation levels are low." This was related to the inequities between the funding of visual arts by the Province of Nova Scotia compared to other provinces which have arm's length arts councils to make grants according to policies. The lack of this type of funding body in Nova Scotia places artists at a competitive disadvantage.

4.2.7.2 Economic Viability

Constraints: Participants said that the greatest constraints on improved economic viability are:

- Visual artists are at the bottom of the list of cultural funding priorities.
- With the exception of the Art Gallery of Nova Scotia, funding for the visual arts sector has been decreasing.
- There is very little skills development funding, less than $35,000 per year and the maximum any artist can receive is $1,000, which is awarded on a first-come basis.
- There is a bias toward the funding of organizations rather than artists.
- Artists need to travel to learn. There is a lack of funding at the provincial level to allow artists to travel.
- There is a lack of facilities for teaching artists new computer-based technology. The Nova Scotia College of Art and Design (NSCAD) had places for eight artists only.
- The level and types of grants available at the provincial level do not give Nova Scotia artists the ability to present themselves nationally. For example, there are no provincial funds for curators to organize travelling exhibitions.
- The lack of adequate art education in the schools limits the development of the local audience and local market.

Opportunities:

- There is a very high quality of art produced in Nova Scotia.
- The Art Gallery of Nova Scotia provides an excellent context for art.
- There are exciting opportunities for partnerships and co-operatives in the province. The example was cited of NSCAD students working with factories to create works of art.

Recommendations and Roles of Stakeholders:

- An "artist in the schools programme" should be started, funded by the province and operated by VANS to provide both art education and work for artists.
- The province should establish an arm's length arts council with a funding system comparable to that of other provinces so that Nova Scotia's artists can compete for national attention on "an even playing field."
- Provincial and local governments should investigate establishing a "percent for art programme" to provide a highly visible local market for Nova Scotia artists in all media.
- Arts organizations and government should work together to establish new models for partnerships and funding, paying special attention to community development traditions pioneered in Nova Scotia.

4.2.8 PERFORMING ARTS – HALIFAX

The performing arts focus group included performers, management and board members in dance, music, singer-songwriters, theatre, the heritage arts, performing arts sponsors and representatives of culture organizations.

4.2.8.1 Survey Data

The focus group participants were invited to comment on an apparent dichotomy which was represented in the survey data. It was observed that the statistical data were generally more optimistic than the respondents' perception of situations as revealed through their comments.

The participants viewed this attitude more as determination, than optimism. They pointed out that income levels were not increasing.

4.2.8.2 Economic Viability

Constraints: The following constraints were identified with respect to improving the economic viability of the performing arts sector:

- The educational system does not do enough to build an appreciation for and understanding of the arts in its students. Students are not being adequately exposed to dance, music and theatre in school. There is no dance school in the province. Dancers must leave the province at an earlier and earlier age.
- The arts infrastructure is not adequately funded or staffed.
- The population generally does not appreciate the value of the arts.
- The government does not view artists as a work force. Artists have no real voice or power to change their situation.
- There is no grant aid for individual artists by the province. The Canada Council is not adequate. Most provinces provide grants to exhibiting institutions to pay for artist's fees. Nova Scotia does not.
- New ways of establishing funding, such as endowments, need to be explored, but the tax system does not encourage it.
- Halifax does not have a vital cultural centre. There are several competing concepts that need to be resolved and combined into one project that would have the support of all.

Opportunities:

- Audience development is the key to the future of the performing arts. Combining different art forms will assist with this development.
- There is an opportunity for a provincial arts council, which would be accountable to all the arts, to play a positive role in Nova Scotia's arts development.
- There may be potential opportunities in the area of heritage arts that could be explored if the wall between "art" and "heritage" were eliminated.

- Nova Scotia has a distinctive and creative culture that forms the basis for opportunity.

Recommendations and Roles of Stakeholders:

- The education system must play a more active role in generating awareness and appreciation for the importance of the arts. It was stated that Nova Scotia students have the lowest self-esteem in the country. Cultural identity can build self esteem. This is a critical partnership between the arts and education. This partnership should be led also by a joint ministerial initiative between the Departments of Education and Tourism and Culture at the provincial level.

- The key federal and provincial funding authorities should fund one development person to assist a presenter organization to help performing arts to tour the province.

- The various arts sectors need to work together not only as advocates for the arts but as presenters. For example, heritage arts and dance can work with the Symphony to create a new presentation, and so on.

4.2.9 LITERARY ARTS – HALIFAX

This focus group included authors, publishers and representatives of associations. The writers covered a broad spectrum including children's literature, history and crime writing.

4.2.9.1 Survey Data

The consultants shared with participants the survey data which showed that literary artists are the least likely of all sectors to derive 100% of their income from their work (writing) in the arts and culture sector. The participants observed that this is mainly because it is easier for writers to earn income in non-arts fields (for example, teaching or journalism).

4.2.9.2 Economic Viability

Constraints: The constraints to improving the economic viability of this sector were described as follows:

- Control of newsstand distribution is in monopoly hands so that relatively few Nova Scotia publications reach the mass market.
- The poor economic state of the book and magazine publishing industry removes income from writers. When magazines go under because of high postal rates or lack of distribution, there is less work for writers.
- Lack of marketing by mainly Nova Scotian publishers is a key factor in the poor performance of book sales by Nova Scotian authors.
- GST has hurt book and magazine sales.

Opportunities:

- Tremendous progress has been made in the last 10 years. Nova Scotia writers have established their legitimacy and a recognizable identity.
- Children's literature, and its writers and publishers are in a stronger position than other parts of the industry. The publishers seem to work with writers to market the books through lectures, talks and school visits.
- The marketing of the province's literary products could be tied into tourism. Nova Scotia has produced literary heroes – both authors and "characters." Yet very few books are available at or promoted to tourists at the historic sites or in the shops of the communities associated with these figures.
- The Public Lending Right has done a great deal to enhance the status and economic wellbeing of writers, but our libraries need to be encouraged to purchase more material from Nova Scotia and elsewhere in Canada.

Recommendations and Roles of Stakeholders:

This focus group made the point that, despite the inequities in provincial funding for the literary arts (Nova Scotia's fees and grants are reported to be less than available in other provinces), writers want distribution not hand-outs.

- Consideration should be given to establishing a Nova Scotia content rule, such as that which exists on radio, for book and magazine distributors. This would set a quota on the percentage of rack space to be available for Nova Scotia books and magazines.
- A partnership should be established between literary arts/publishing and tourism. The provincial travel guides should feature the books that were written in or about specific communities; literary tours should be marketed, and relevant literary works should be promoted and sold at historic sites, visitor centres, museums and tourist information centres.
- Writers, publishers and other stakeholders need to get together to develop a marketing strategy.

4.2.10 VISUAL ARTS/CRAFTS – ANNAPOLIS ROYAL

This focus group session included artists, including an installation artist, craftspersons in ceramics, wood turning and quilting, as well as members of CARFAC and the local arts council. (All three sessions in Annapolis Royal were well attended by participants in the local arts council, which has been functioning at a high level for 10 years. It was particularly instructive to the consultants to hear how much the arts council had contributed both to the cultural life of the community and to the economic viability of its artists).

4.2.10.1 Survey Data

The consultants presented survey data which demonstrate that a significant percentage of artists believe they may market their work outside the province. In the discussion, participants pointed out that this is particularly true for craftspersons. One of the craft producers at the session said he earned 60% of his income outside Nova Scotia. The One of a Kind Show in Toronto accounts for 50% of one producer's annual sales.

4.2.10.2 Economic Viability

Constraints: The constraints to improving the economic viability of this sector were described as follows:

- The government does not recognize the social and economic benefits generated by the volunteer work performed by artists.
- Artists are ineligible for small business development grants whereas craftspersons are eligible.
- Lack of a cultural policy contributes to the poor status of the artist in Nova Scotia.
- Some type of assistance is needed to market products outside Nova Scotia -- perhaps a co-operative or an agent.
- Artists are often ineligible for UIC.
- Nova Scotia artists do not have parity with artists in other provinces in terms of grants, exhibition opportunities and training.
- GST has created barriers to sale of expensive art/craft items. A very successful artist who has his own shop reported that despite having more people in the shop, sales declined clearly as a result of GST.
- There is a lack of curatorial guidance available to artists in the area. Studio visits by knowledgeable curators are a critical aspect of the training and development of visual artists.

Opportunities:

- The arts and craft products are of high quality and there is an international market for them.
- The dedication of volunteers in the arts and culture sector can result in many positive achievements, as demonstrated by the achievements of the local arts council. The Arts Council started with 15 members ten years ago and now has 150 members in the Annapolis Royal area. Its annual art festival creates economic benefits for artists.
- The Cultural Centre in Annapolis Royal focuses both local and tourist markets on the arts.

- A local grass roots marketing project is under way to produce a studio tour map for artists in the area. The map will be widely distributed and will promote a three-day studio tour of the region.

Recommendations and Roles of Stakeholders:

- Small co-ops could enable Nova Scotia artists and craftspeople to tap into the Boston and Toronto markets and to act as a buying agency to purchase supplies at better prices.
- The province needs to support artists through efforts such as the establishment of fee schedules, and grants for shipping work to other areas.
- A simplified GST rebate system is desperately needed on art and craft purchases by tourists in order to return sales to pre-GST levels.
- Artists should be included in the Industry Guide published by the province.
- Artists and their products are the best promoters of Nova Scotia as a great place to live, as a place to invest and as a place to visit. Partnerships with government departments like Tourism, Industry and Trade should be made with artists on that basis.

4.2.11 HERITAGE – ANNAPOLIS ROYAL

This focus group included heritage interpreters, an architect, researcher and leader in the Annapolis Royal preservation movement. Annapolis Royal is a living example of what can be accomplished when successful partnerships are initiated by a community and maintained (for 12 years) through a project where quality is paramount.

4.2.11.1 Survey Data

Participants were asked for their comments on survey data which showed a high percentage of part-time employment. In the heritage field this was seen as a reflection of inadequate funds with which to hire full-time staff.

4.2.11.2 Economic Viability

Constraints: The constraints to improving the economic viability of this sector were described as follows:

- There are no tax incentives to encourage heritage activities.
- Heritage preservation is hindered by the attitude of members of the public that "old" is synonymous with poverty. One of the participants is from the Acadian community and she observed that this attitude is still very prevalent there.
- Heritage preservation is viewed as too expensive.
- Fragmentation among the different groups involved in heritage and culture prevents cohesive and effective action.

Opportunities:

- There is great potential for corporate and private support for heritage preservation, far beyond that which has been realized.
- There is an important link between heritage preservation and economic development. When buildings are restored and the local crafts are also restored, people are employed and trained in the restoration process. Local materials are used in restoration and this produces an additional benefit.
- There is great potential for heritage arts at heritage sites.
- There are untapped programming opportunities in Annapolis Royal to bring the community to life and to attract tourists – for example, to create an annual event – the Twelve Days of Christmas.

Recommendations and Roles of Stakeholders:

- The formation of an umbrella group for heritage interpretation to overcome the fragmentation of arts and heritage groups. Its mandate would be to involve all aspects of arts and culture in the interpretation of Annapolis Royal.

- There is a need for training in the heritage sector. Annapolis Royal has the expertise in how to preserve and develop a major heritage area, how to obtain designation and restore historic buildings, and how to organize and to raise money. The community offers the ideal setting to offer training to people who work in heritage industries including both heritage sites and related service sectors (hotels, restaurants and gift shops).

- There is a need for accreditation in the heritage sector. Accreditation could be offered in partnership with a university or technical college and should be linked with an accreditation programme operated by either the Department of Tourism and Culture or an arm's length agency.

4.2.12 PERFORMING ARTS - ANNAPOLIS ROYAL

4.2.12.1 Survey Data

Participants in this session included presenters, a producer and trustees of performing arts venues. Participants were asked about the issues of part-time employment. They indicated that much of the performing arts activity was of a part-time nature because of insufficient funds to allow greater programming activity. It was also perceived that tourism audiences were scattered, with little attempt to direct the attention of tourists toward a series of visitation opportunities.

4.2.12.2 Economic Viability

Constraints: Participants said that the greatest constraints on improved economic viability in the performing arts were:

- A lack of coherent policy framework and grant criteria.

- A lack of touring product, in part because high performing fees often do not allow ticket prices to be offered at a reasonable rate.

- The amusement tax adds 10% to the ticket price for performing arts events.

Opportunities:

- Participants felt that a defined programme of block booking for both single artists and full-scale productions would benefit all parties. This would allow more product to become available due to increased opportunities and at lower fees because of guarantees of more performances. This would also provide joint marketing opportunities for the presenters.
- A market needs assessment to develop more programming options. At the present time there is a little hard data about either local or tourist audiences. Programming is considered to be haphazard, based on a "gut feel" as to what might sell in a given community. Virtually no producer, presenter or trustee is willing to take on any "risk" programming because of the precarious financial situation of the entire performing arts sector.
- Tourism was seen as a major opportunity for the creation of festivals and a touring circuit within the province.

Recommendations and Roles of Stakeholders:

- The performing arts sector should look at training of the highest possible calibre in the areas of marketing, fundraising and board development. There is a role for the Nova Scotia Drama League in the coordination and delivery of such training programmes which should be held outside the City of Halifax.
- A service organization for music should be established in Nova Scotia.
- The 10% amusement tax should be rescinded on all live performance activity.
- A special grant programme should be developed to create new audiences for performing arts product which may not necessarily attract a large audience but which does meet a need for a certain segment of the population, e.g. modern dance.
- Grant criteria for regional theatres should be restructured to avoid criteria which tie the amount of the grant to the number of contracted performances.
- The provincial government should develop an arm's length process for determining funding policies and all grant criteria. The arts organizations and artists of Nova Scotia should be consulted in this process.

- The various cultural federations in Nova Scotia should work more closely together in providing cross-disciplinary training programmes and in relating to all parts of the province.

4.2 GENERAL ISSUES ARISING FROM FOCUS GROUPS

The following general issues and concerns were frequently mentioned during focus group sessions and are therefore listed here, in random order, by way of summary:

4.2.1 Financial

- provincial funding policies and levels;
- arm's length funding, juried grants;
- accessibility of small business development loans;
- tax recognition for volunteerism;
- tax rebates for tourists;
- cooperative purchasing mechanisms;
- employment opportunities for artists;
- support systems for national and international exposure.

4.2.2 Partnerships

- linkages between culture and education;
- linkages between culture and tourism;
- distribution systems for crafts, books, records, films;
- need to break down barriers between various arts and crafts disciplines - networks among disciplines;
- communications at every level;
- role of federations and associations and their accountability;
- development of arts industries from grass roots up rather than top down;
- cultural policy for the province.

4.2.3 Recognition

- worth/value of artists;
- arts literacy;
- art as art, not tourism; or conversely, art as tourism;
- critical assessment of product - "reviews."

4.2.4 Training

- marketing;
- board development;
- business skills;
- attracting and maintaining volunteers;
- technological advancements;
- quality control.

5. LITERATURE REVIEW

Photo of Alistair MacLeod reading to a sell-out crowd at the Dartmouth Library during WFNS Writes of Spring III, May 29, 1992; courtesy of Writers Federation of Nova Scotia.

5. LITERATURE REVIEW

This chapter addresses the research context of the Nova Scotia Arts and Culture Sector Study by reviewing available reports and other data relevant to this study.

5.1 INTRODUCTION

Most studies of the arts and culture labour force have focussed on the economic contribution and social importance of the arts to our society. Some studies have attempted to develop a profile of artists as a distinct sector of the labour market. Other recent studies have focussed on the training and education of the arts sector.

The following sections of this chapter summarize a selection of recent studies or works in progress which examine who artists are, various aspects of how they make their living and the conditions under which they work. These studies, individually and collectively, provide a useful context in which to examine the survey data and findings which emerged in this Nova Scotia Arts and Culture Sector Study.

The various studies reviewed include:

5.2 National Studies

5.2.1 *Cultural Labour Force Project,* Statistics Canada (in progress)

5.2.2 *Art is Never a Given: Professional Training in the Arts in Canada,* Task Force on Professional Training for the Cultural Sector in Canada, 1991

5.2.3 *Rethinking the Status of the Artist: Toward a Balance of Equity and Excellence,* Ekos Research Associates Inc., 1989

5.2.4 *Final Report of the Study of Management Development Needs of Publicly Funded, Not-for-Profit Arts and Heritage Organizations,* the Canadian Association of Arts Administration Educators, 1987

5.2.5 *The Museum Labour Force in Canada, Current Status and Emerging Needs,* Ekos Research Associates Inc., in Association with LORD Cultural Resources Planning and Management Inc., 1989

5.2.6 *The Status of the Artist,* Report of the Task Force, 1986

5.3 Provincial Studies

5.3.1 Ontario

5.3.1.1 *Occupation: Artist - A Profile of the Demographic, Economic and Employment Characteristics of Artists in Ontario,* Ontario Arts Council, 1992

5.3.2 Nova Scotia

5.3.2.1 *Locating Our Voices Workshop,* **Follow-up Survey, Mount St. Vincent University Art Gallery,** Spring, 1991

5.3.2.2 *Public Policy and Cultural Development in Nova Scotia,* The Report of the Cultural Development Committee of ARTS NOVA and the Nova Scotia Coalition on Arts and Culture, May 1990

5.3.2.3 *Coming of Age: Report of the Nova Scotia Arts Advisory Committee,* September, 1991

5.3.3 New Brunswick

5.3.3.1 *Final Report, Premiers' Advisory Committee on the Arts,* New Brunswick, 1989

5.3.4 Prince Edward Island

5.3.4.1 *Report on Economic Impacts and Opportunities in the Cultural Industries of Prince Edward Island,* DPA Group Inc., March 1988 (Executive Summary)

5.4 Regional/Municipal Studies

5.4.1 Metropolitan Toronto

5.4.1.1 **Metro's Role in Arts and Culture: A Discussion Paper,** The Municipality of Metropolitan Toronto, 1992

5.4.1.2 *The Arts and Economic Development,* prepared for the City of Toronto by the Toronto Arts Council, February, 1992

5.5 United States Studies

5.5.1 *The Modern Muse: The Support and Condition of Artists,* C. Richard Swain, Ed., American Council for the Arts, 1989

5.5.1.1 *Assessing the Artist's Condition: Some Qualitative Issues,* John Robinson, 1989

5.5.1.2 *The Artist's Condition From the Regional Perspective: The Outlook From the Midwest,* C. Lynn Cowan, 1989

5.5.1.3 *Forecasting Artist Employment to the Year 2000,* 1989

5.5.2 *The Artist Alone: Work-Related, Human and Social Service Needs - Selected Findings,* Joan Jeffri, Joseph Hosie and Robert Greenblatt, 1987

5.5.3 *Between Extremities: the Artist Described,* Joan Jeffri and Robert Greenblatt, 1989

5.5.4 *Information on Artists - a Study of Artists' Work-Related Human and Social Needs in 10 U.S. Locations,* Joan Jeffri, 1991

5.2 NATIONAL STUDIES

5.2.1 *Cultural Labour Force Project,* Statistics Canada (in progress)

This research project, presently being carried out by Statistics Canada, with the sponsorship of Employment and Immigration Canada, will be the first cross-occupational examination of Canadian artists and cultural workers. This study will provide a useful national context for the Nova Scotia arts and culture labour market.

The mandate of the study is as follows:

> *"To develop a survey of the cultural labour force to provide EIC with information on career activity, training, financial status, demographic and other relevant material on creative and technical persons in the culture sector. This proposed objective will be achieved through the collaboration of a network of information users and suppliers. The survey will serve as a benchmark for further research and will provide essential information for the culture sector. The survey will be oriented toward providing data for use in the application of EIC programmes and services."*

Results of the study are not expected to be available until early 1994. The research team is in the process of conducting consultations with the arts community that will lead to definitions of their information needs. It is worth noting that this research project, like Nova Scotia's, stems from the need for information about "the artists themselves." Since the Nova Scotia study will be completed during the preliminary research phase of the federal study, it may be hoped that the data categories developed will lead to comparable information.

5.2.2 *Art is Never a Given: Professional Training in the Arts in Canada,* Task Force on Professional Training for the Cultural Sector in Canada, 1991

Created in April 1990 by the federal Department of Communications and Employment and Immigration Canada, this Task Force consisted of arts educators and administrators who set out to determine how these two departments and other related departments could improve professional training for the arts in Canada. The report identifies the training needs of Canadian artists and the barriers which impede them. The Canadian arts and heritage community, through the Canadian Conference of the Arts, strongly endorsed the report.

The mandate of the study was as follows:

> *"To report on the current situation of professional training in the artistic community and museum sectors; to identify the needs and the recommended necessary action by the Government of Canada."*

Main Findings:

During the course of their work the Task Force made two significant observations:

1. Artists are discouraged. Isolation, poverty and lack of understanding characterize their lives.

2. The younger generations of Canadians are receiving less and less exposure to the arts because attempts to bolster the calibre of science education have left the arts behind and because the generation of teachers, artists and specialized professionals who have been the mainstay of arts education are "disappearing" and they are not being replaced.

The following specific findings also emerged from the Task Force's work:

- **Barriers to Access to Arts Training:**
  - **Geographical Barriers** - the problem is not that Canada lacks teaching establishments and programmes, but that they are concentrated in urban areas.
  - **Urban/Rural Disparities** - rural artists do not necessarily have the same concerns as those in urban areas.
  - **Lack of Qualified Human Resources in Rural Areas** - fewer and fewer qualified teachers and experienced artists may be found in the rural areas because they flock to major urban centres.
  - **Economic Barriers** - many artists simply do not have the means to engage in professional development.
  - **Cultural Barriers** - art continues to be judged by "Western sensibilities," resulting in the exclusion of some "non-Western" forms of artistic activity.
  - **Status of Women** - female artists face a number of handicaps in the development of their careers and they are under-represented in certain disciplines and in management positions in training institutions.
  - **Francophone Communities Outside Quebec** - cultural barriers and geographical isolation render resources and arts training difficult for Francophone artists living outside Quebec.

  - **Other Minority Groups** - artists who are members of minority groups encounter difficulty in accessing artistic training, because of racism and biased evaluation criteria.

  - **Poor Quality of General Arts Teaching** - lack of qualified teachers, a deficiency of contacts with artists and lack of proper equipment all lead to the poor quality of arts teaching which characterizes our education system.

- **The Need for On-going Training:**

  - **Access to Practice and Training** - artistic practice, and on-going training are essential to the professional development of the artist and these needs are life-long. Lack of income and physical access often prohibit what is the life-blood of their development.

  - **The Essential Link Between Training and Practice** - there is a vital, mutually beneficial link between educational institutions and practicing artists. This interaction allows for the maintenance of the flow of new ideas and approaches and is the foundation for emerging technology.

  - **Variance of Training Needs According to Discipline** - the needs of artists vary according to discipline and within each discipline. There is no one type of training programme which will suit all artists.

  - **Variance of Needs According to Career Stage** - at any stage in an artist's career the need exists for professional development. The type of professional development programme will vary according to the career stage of the artists.

  - **Need for Flexibility in Programmes** - because of the variances which exist within the artistic community in terms of discipline, context and location, programmes must be flexible enough to respond adequately to meet these variety of needs, using a variety of methods.

- **The Need for Suitable Training Resources:**

  - **Institutional Network** - training for artists is offered at both public institutions and at independent, specialized institutions. These two types of institutions often play complementary roles in arts training.

  - **Lack of Recognition** - while independent specialized institutions play a fundamental role in the training of artists, there is some dissatisfaction as a result of the failure of funding bodies to recognize these institutions.

  - **Non-institutional Sector** - artists' organizations such as artist-run centres, visual arts workshops and video cooperatives are also valuable and viable training organizations, but there is concern that support for them is tenuous.

- **Lack of Access to Information:**

  - Because of the large number of sources from which artists may apply for funds toward professional development and training, it is not always easy for them to be aware of all the possibilities which exist for them. Those guides which are published often do not reach outlying communities and/or are not suited to artists and arts students.

5.2.3 *Rethinking the Status of the Artist: Toward a Balance of Equity and Excellence*, Ekos Research Associates Inc., 1989

This report is the product of "one of the largest and most comprehensive studies of artists and their role in modern society." Commissioned by the Department of Communications, it attempts to better understand the conditions faced by artists and the role government legislation, policy and programmes may have on these conditions. Because of the comprehensive nature of the study, it provides a particularly useful context in which to examine data regarding the arts and culture labour force in Nova Scotia. It must be noted, however, that artists surveyed in the Ekos study tended to be the more successful, full-time, professional artists.

The mandate of the study was as follows:

> *"To provide a broad snapshot of the social and economic status of the artist in Canada."*

Main Findings:

- **Social and Economic Status (data mainly from 1985 and 1988)**

  According to the study:

  - The average artist was 44 years old; 30% had a graduate degree, and another 30% had an undergraduate or college degree.
  - Artistic income varied greatly between disciplines; directors had the highest artistic income at $37,333, while dancers and choreographers were lowest at $16,698, before expenditures (1985 data).
  - Artists' work-related expenditures were higher than those made by the average worker.
  - Income from work outside the arts was important for those employed in a number of arts disciplines, particularly visual artists and literary artists.
  - 20% of visual artists and less than 10% of artists employed in other disciplines received income from government arts grants.
  - Between 4% and 15% of artists received unemployment insurance or welfare payments from the government in 1985, and between 11% and 26% received financial support from friends and family.
  - Female affiliated artists earned, on average, 63% of the arts incomes earned by men while female unaffiliated artists earned 57% of the arts income earned by male unaffiliated artists.
  - Artists' mean total employment income (personal, not household income) was comparable to the mean income of Canadians from all occupations; in fact, except for dancers/choreographers and to a lesser degree literary artists, artists' mean employment incomes were higher than the average for Canadians from all occupations. If income were based solely on income from artistic activities, the majority of artists would rank lower than the Canadian average.
  - Slightly over 50% of artists had a household income higher than the Canadian average for households of the same size.
  - Approximately 25% of affiliated artists and 33% of unaffiliated artists could be classified as low income under the Statistics Canada Low Income Cut-Offs.

  - The mean number of weeks worked full-time as artists ranged from 32 to 44. The median number of hours worked per week ranged from 32 to 40 hours, excluding work in non-artistic disciplines; an average working week for artists was 50 hours.

  - Artists worked between zero and 20 weeks per year at other types of full-time employment, and between zero and nine weeks at other types of part-time employment. However, most artists did not work part-time or full-time outside their artistic discipline.

- **Artists' Perceptions of Themselves:**

  - Lack of artistic awareness on the part of the public was seen by artists as contributing to their low status within Canadian society.

  - The great majority (over 80%) of artists were satisfied with their career choices.

5.2.4 *Final Report of the Study of Management Development Needs of Publicly Funded, Not-for-Profit Arts and Heritage Organizations*, the Canadian Association of Arts Administration Educators, 1987

This report provides useful insights into the administrative side of the arts sector. It identifies a need to improve the professional training programmes for those wishing a career in arts administration and recommends that an investment is necessary to improve the quality and quantity of professional education opportunities for practising arts administrators and Boards of Trustees.

The mandate of the study was as follows:

> *"To examine the needs of arts administration to the year 2000, with particular reference to the role of training in professionalizing the discipline of arts administration and strengthening the administration of the arts."*

Main Findings:

- Arts administrators working for not-for-profit organizations possess a unique combination of administrative and management skills and artistic knowledge.

- Arts administrators are not simply responsible for administration and management, but for helping to create a receptive climate for the arts.
- Knowledge, skills and attitudes required by arts administrators fall into four areas:
    - administrative skills which are not unique to arts administration;
    - administrative skills which are unique to arts administrators working in the Canadian cultural context;
    - knowledge of the artistic or heritage field which is being administered;
    - values and attitudes towards arts/heritage.
- The skills required at entry level, middle and senior management levels vary according to the size of the organization.
- Arts administration is dependent on a combination of education and experience.
- Arts administration is emerging as a distinct profession.

5.2.5 *The Museum Labour Force in Canada, Current Status and Emerging Needs,* Ekos Research Associates Inc., in association with LORD Cultural Resources Planning and Management Inc., 1989

The Professional Development and Standards Committee of the Canadian museums Association commissioned this study to assess labour market needs in Canadian Museums. This study provides an in-depth examination of one component of the arts and culture sector on a national level.

The mandate of the study was as follows:

> *"To increase the current state of knowledge concerning the nature of the museum labour force and assess the current and future human resource requirements."*

Main Findings:

- **Shifting Societal Landscape:**
  - The broad changes which are occurring in society form the context in which museums function. These changes have and will continue to lead to the assignment of increased priority to heritage and custodial facilities. The study found that there are some questions as to the ability of the museum labour market to meet the challenges presented as a result of these changes.
- **The Current Museum Labour Force:**
  - There were nearly 10,000 paid, professional and technical workers in the museum field, of which over 6,000 were full time. Most could be classified as professionals.
  - There was some unevenness in the distribution of the labour force. Nearly 40% were located in Ontario, but only 14% in Quebec, the Prairies, and Atlantic Canada respectively; (Since Atlantic Canada accounted for only about 9% of Canada's population, its museum labour force per capita was higher than the national average).
  - While most museums were non-governmental, the majority of workers were employed by institutions which operate under the authority of federal or provincial governments.
  - Operating budgets of museums are disproportionately small in comparison to the size of their assets.
  - Most small museums have no full-time professional staff.
- **Equality - Human and Capital:**
  - While there has been substantial capital investment in the museum sector, this has not been evidenced in the areas of salaries and professional development.
  - The average museum worker was 40 years old, had one university degree and earned $30,000.
  - Limited operating budgets have left very little room for training and professional development expenditures.

  - Systematic inequality within the museum labour force exists. This inequality is: regionally based, with more money and training opportunities in Ontario than elsewhere; gender based, while there are an almost equal number of men and women working in museums, more women tend to work for the smaller museums and earn less money; institutionally based, with workers at larger museums earning higher salaries.

- **Quality of Life:**

  - The study found a modest level of satisfaction among museum workers, but also significant feelings of indifference, apathy and marginalization.

- **Nature of the Job:**

  - Some jobs feature a broad array of different tasks, whereas others are very focussed on a single function.

  - Management positions in particular are based on little original educational training.

- **Professional Development and Training:**

  - 80% of museum employees take at least one development/training course per year.

  - There is great emphasis placed on the benefits of training for employees rather than for management. There are indications that training opportunities are viewed as compensation for low salaries.

  - There is no significant relationship between the use or amount of training and career progress or mobility.

5.2.6 *The Status of the Artist*, Report of the Task Force, 1986

This study is the product of a Task Force on the Status of the Artist commissioned by the Minister of Communications in 1986.

The mandate of the study was as follows:

> *"To undertake broad consultation with the Canadian artistic profession and to develop an action plan which will result in improved conditions for Canadian artists working in all disciplines."*

Main Findings:

- **Public Perception:**
  - The public does not view "artist" as a profession. It is neither understood nor appreciated. The study points to the educational system and the media as tools for counteracting this negative image of artists.
- **Taxation and the Artist:**
  - The *Income Tax Act* is perceived to be at the heart of many difficulties experienced by artists, in that it does not take into consideration the special needs of artists and the realities of their lives. The Act does not allow for recognition of the substantial investment made in supplies and equipment as necessary expenses in the production of art. The "reasonable expectation of profit" applied to self-employed artists does not reflect the realities of their lives. Issues related to federal sales tax, customs and excise taxes were also perceived to put artists at an unfair disadvantage.
- **Lack of Social Benefits:**
  - Artists lack the social "safety nets" which most Canadians have access to such as unemployment insurance, health and safety programmes, worker's compensation, and disability insurance.
- **Income:**
  - The status of the artist in Canada is one of poverty. According to statistics reviewed by the Task Force, on average no artistic discipline earned income above the poverty line. [1]
- **Legislative Recognition of the Artistic Profession:**
  - There is a need for legislative recognition of the fundamental right of the artistic worker to collective bargaining.

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[1] Data cited earlier disputes this claim.

- **Training and Development:**
    - The artistic profession expressed concern over the lack of adequate funding for the national training institutions required to establish high national and international standards. Limited funds for professional development was also viewed as a significant problem.
- **Equality - Regional, Gender:**
    - Regional and gender-specific impediments to equal development exist within the artistic field. Female artists and artists who do not work in large urban centres face even greater difficulty accessing the resources required to pursue and develop their careers.
- **Cultural Sovereignty and National Identity:**
    - Artists are proud of their role as purveyors of our cultural values and are prepared to continue in their struggle against the erosion of Canadian cultural sovereignty and national identity.
- **Cultural Identity:**
    - Artists recognize the importance of the artistic profession in helping to articulate and shape our Canadian cultural identity and despite their seemingly undervalued status, are prepared to continue doing so.

5.3 PROVINCIAL STUDIES

5.3.1 Ontario

5.3.1.1 *Occupation: Artist - A Profile of the Demographic, Economic and Employment Characteristics of Artists in Ontario*, Ontario Arts Council, 1992

This newly released study seeks to examine the condition of individual artists and to raise awareness of this distinct sector of the Ontario work force. Conducted by the Ontario Arts Council, and based on 1986 Census of Canada data from the arts occupation database, the information contained in this report provides a useful comparison for the status of those working in the arts in Nova Scotia. However, the definition of the artist is much broader than that of the Nova Scotia study as it is based on the Statistics Canada Standard Occupational Classification (1980) which includes many commercial art occupations excluded from the Nova Scotia study.

The mandate of the study was as follows:

- *to provide a general profile of artists in Ontario in terms of selected demographic, employment and economic characteristics;*
- *to add to the body of arts research in Ontario by providing objective and reliable statistical information on arts occupations;*
- *to raise awareness of artists as a distinct sector with social and economic importance to Ontario;*
- *to assist the Ontario Arts Council and others in policy and programme development by building an understanding of the needs of artists.*

Main Findings:

- Number of Artists and Occupations:
  - In 1986 there were 66,815 persons employed as artists in Ontario, (as defined by Statistics Canada) accounting for almost 1.5% of the total labour force. Almost half (45%) of those artists worked in fine and commercial art and photography, 29% in writing-based occupations and 26% in performing and audio-visual arts.
- Regionalism:
  - About 68% of Ontario's nearly 67,000 artists lived in Metro Toronto or Ottawa. By comparison, these two regions were home to 45% of the Province's population.
- Gender:
  - Males make up 57% of those employed in arts occupations, one percent higher than the number of males who make up the experienced labour force. There is substantial variance in the male-female ratio within the various arts disciplines; 80% of those employed in radio and television are male, while 80% of those employed in choreography are female.

- Age:
    - In 1986, 78% of artists were between the ages of 15 and 44 years of age, compared to 72% of the overall labour market. Average age varied according to individual occupations.
- Language:
    - A higher than average number of artists were bilingual. Of those employed in arts occupations, 22% were bilingual, as compared to 12% of the population of Ontario.
- **Education:**
    - Artists in the Province of Ontario had higher than average levels of education; 78% of those employed in arts occupations had some post-secondary education, compared to 52% of the overall labour force, while the percentage of artists who had a university degree was double that of the overall labour force.
- **Unemployment:**
    - The unemployment rate among artists in 1986 was 5.1%, compared to 6.8% for the population of Ontario. Only performing and audio-visual artists had higher rates of unemployment.
- **Full-time/part-time:**
    - More than 77% of Ontario artists worked full-time, which is slightly less than for the labour force as a whole (80%). For painters, sculptors and related artists, only 64% worked full-time. For performing arts, 72% worked full-time. Only 62% of actors worked full-time.
- **Type of Employment:**
    - There was a higher than average number of artists who were self-employed; 24% of those with arts occupations were self-employed compared to 6% for Ontario's overall labour force.

- Income:
  - The average individual income from all sources of those employed as artists in 1985 was just $373 less than the average income for the total Ontario labour force. However, eight of twelve arts-related occupations had average total incomes well below the provincial average; for example, musicians and singers earned 30% less than the provincial average, painters, sculptors and related artists earned 28% less than the provincial and average, and dancers and choreographers earned 26% less than the provincial average.

- Gender and Income:
  - On average female artists in 1985 earned 68% of the total income of male artists. In comparison, females earned only 56% of the total income of those males employed in the Ontario labour force. The income gap between male and female artists is less between younger artists and increases with age.

- Self-employed Income vs. Salaries and Wages:
  - The average income of self-employed artists was 44% less than that of artists receiving salaries and wage income in 1985. Across all occupations for the province, self-employed persons averaged incomes 3.7% less than those receiving wages and salaries.

5.3.1.2 *The Status of the Artist; A Discussion Paper*, Ontario Ministry of Culture and Communications, February, 1990

This discussion paper was prepared by the Ministry of Culture and Communications in order to develop a provincial position paper on the subject. As the process is in its early stages it will be of use to the Nova Scotia Arts and Culture Sector project to follow its progress.

The mandate of the study is as follows:

- *to describe the current situation of individual, professional artists and identify some of the factors contributing to it;*

- *to outline the measures which have or are being taken by other jurisdictions to improve the status of the artist;*

- *to identify which level of government has constitutional jurisdiction over which issues affect artists;*

- *to pose questions to stimulate thought on issues for which the province has some responsibility.*

Main Findings:

Based on informal discussions with representatives of a number of arts service organizations operating in the Province of Ontario, the following issues were identified:

- **Labour Matters:**
    - Collective bargaining rights/employment standards.
    - Health and safety in the workplace.
- **Income**
    - Taxation - fiscal status, incentives for donations, designation of charitable status, federal sales tax and G.S.T.
    - Pensions - employment, Canada Pension Plan.
    - Arts education.
    - Job training and employment.

5.3.2 Nova Scotia

5.3.2.1 *Locating Our Voices Workshop*, Spring, 1991 Follow-up Survey, Mount St. Vincent University Art Gallery,

Mount St. Vincent University undertook a survey of marginalized artists whose art has not been significantly represented in public galleries. This followed a workshop to discuss how increased interest in the art of these groups is affecting their work and attitudes. The participants represented the following groups: Native, Acadian, black, craftspeople, ethnic, cross-cultural, rural and feminist. It was further hoped that an understanding would be gained of the role university galleries could play with respect to these artists and their audiences.

Main Findings:

- Success:
  - When asked what they felt constituted success as artists, those surveyed responded with the following criteria: 63% said that exhibitions were an important indicator of success, 38% viewed recognition by their peers as a sign of success, 25% indicated that receiving grants or funding was evidence of success, while 19% believed media and critic reviews was a criterion of success.
  - The majority of respondents (75%) considered their work to be well received. Over half of these added the qualifier, "when it is seen."
  - When asked if they felt they had progressed as far as they thought they would have five years ago, 62% of respondents believed they had, while 25% felt they had not. Those who had set no goals against which to measure, nevertheless felt happy with their progress. One artist differentiated between artistic progress (affirmative) and economic progress (negative).
  - When asked to state their most significant artistic achievement, half responded with answers relating to personal achievements such as maintaining dedication to art or not compromising one's values. The other half of respondents defined their achievements in terms of sales, scholarships, progressive shows, attaining status.
- Barriers:
  - Of those who had not made the kind of progress they had anticipated, 62% did not feel this was the result of any particular barriers they had encountered. Of those who did feel their success had been impeded, the majority cited economic barriers such as lack of funding, the need to work outside the art field to support oneself, and expensive materials.
- Future Goals:
  - The majority of respondents viewed the future of their careers positively, many having defined goals such as further education, teaching and writing. Continuing to make art, while reaching a better balance with other responsibilities such as family, and money-making was a common response. A minority of respondents had future goals of a much less optimistic nature, seeing their careers as a struggle to get by.

- **Community:**

    - When asked through which groups they defined or compared their work, the majority indicated their answers in ideological or political terms, such as feminist artists, lesbians, natives, anti-racists. Other definitions were of a less overtly political or ideological nature, such as other women artists, artists of the same medium or who work in the same region, artist friends, single parents.

- **Recognition:**

    - When asked if they felt their work had received its due recognition, 69% responded that it had, but with some reservations, such as recognition limited to a specific region or group of people. Two respondents felt unconditionally that their work was receiving the reception it deserved. Three respondents did not feel their work was receiving due recognition, two of those feeling this was as a result of their youth.

- **Role of University Galleries:**

    - The majority of respondents felt that university galleries have a special role in arts education and can play a progressive role in highlighting work which communicates alternative perspectives.

5.3.2.2 *Public Policy and Cultural Development in Nova Scotia,* The Report of the Cultural Development Committee of ARTS NOVA and the Nova Scotia Coalition on Arts and Culture, May 1990

This project was initiated by the Nova Scotia Coalition on Arts and Culture under the auspices of the Cultural Development Committee and ARTS NOVA.

The mandate of the study was as follows:

- *to examine the state of public support for cultural development in Nova Scotia and to raise the level of cultural activity and awareness in the province;*

- *to inform the cultural community about the role of the provincial government in funding the arts;*

- *to educate the larger community including the government, on the growing role which the arts play in the social and economic life of the province;*

  - *to prepare new policies, structures and programmes which will enhance Nova Scotia' future cultural development.*

Main Findings:

- **Provincial Cultural Policy:**
  - The Province of Nova Scotia does not have a clearly articulated cultural policy.
  - The "policies" of the Cultural Affairs Division (CAD) are in actuality guidelines for individual programmes.
  - While these CAD policies appear to promote "indigenous cultural production", CAD expenditures are not so clear in their support.
- **Funding:**
  - In 1986-87, 8.4% of the government's cultural budgets were spent on cultural production. Only New Brunswick spends less per capita than Nova Scotia on cultural production, which is defined as money spent on the creative output of artists.
  - Grants to individual artists represented only 1.5% of the total grants for cultural production given out by CAD in 1986-87.
  - On average, Canadian provinces spend seven times as much per capita on grants to individual artists. This deficiency affects disciplines which are made up primarily of individual artists, including literary and visual arts.
  - The administration of the CAD is not as efficient as the average arm's length arts council.
  - The Province of Nova Scotia takes more out of the cultural sector through the taxation of goods and services than it puts backs through investment in cultural production.
- **Structures:**
  - In addition to the two existing culture structures (the Department of Tourism and Culture and the Cultural Federations of Nova Scotia) two new arm's length agencies -- an arts foundation and an arts council -- should be formed.

- **Department of Tourism and Culture:**
  - The Cultural Affairs Division should remain as the primary source of provincial funding to provincial cultural agencies and institutions.
  - A formal cultural policy should be developed by the Department of Tourism and Culture in consultation with the arts community.
  - The association of Culture with Tourism should be re-examined, and consideration given to the establishment of a separate Department of Culture.
  - A Cultural Advisory Board to the Minister should be established by the Department of Tourism and Culture.
- **Cultural Federations of Nova Scotia:**
  - The Cultural Federations of Nova Scotia (CFNS) has had its effectiveness limited by inadequate funding.
  - A review of the CFNS should be undertaken with a view toward increasing its representation and effectiveness, and improving operating conditions.
- **Arts Foundation:**
  - The need exists for the establishment of an arts foundation to serve as an arm's length agency in raising funds, to act as an endowment trustee and funding agency, and to gather cultural statistics.
- **Arts Council:**
  - There is a need to establish an arts council which would function at arm's length from the government and, using a peer review process, allocate funds to individual artists and small arts organizations.
- **Community Arts Councils:**
  - Community arts councils are a vibrant part of the province's cultural community, but they generally lack the resources necessary to achieve their potential.
  - Priority should be given to providing increased funding to community arts councils.

- Cultural Initiatives:
  - There are a number of cultural initiatives, including readjustments of existing budgets, interdepartmental, federal-provincial and private-public cost-sharing, provincial lottery revenues and new tax revenues, which represent potential funding options. These initiatives should be explored.
- Arts Education:
  - Arts education in Nova Scotia's schools is key to the development of the arts and culture sector in the province.
  - Arts education in the province has been inconsistent and requires a review by the Department of Education.

5.3.2.3 *Coming of Age: Report of the Nova Scotia Arts Advisory Committee*, September, 1991

This report details the discussions and conclusions of the Nova Scotia Arts Advisory Committee.

The mandate of the Committee was as follows:

- *to examine the ARTS NOVA Report and its recommendations ... to seek such other input from professional and community arts sources as may be helpful in preparing advice for the Minister of Tourism and Culture on arts funding policies, programmes and processes;*
- *to make recommendations on the creation of a permanent Minister's Advisory Council on Arts and Culture;*
- *to look at ways to channel advice and public input to the Minister on issues over a broad range of cultural and heritage priorities.*

Main Findings:

- **Cultural Policy Board:**
    - A Cultural Policy Board should be established to advise the Minister on the creation and implementation of cultural policy and legislation, oversee a peer-juried programme of project grants to artists and cultural organizations, and to initiate and organize regular cultural policy conferences.
    - The makeup of the Cultural Policy Board must be representative of all the various constituencies within the cultural community.
    - A restructured Cultural Federations of Nova Scotia Board should serve as the Cultural Policy Board.
- **Cultural Policy:**
    - There is no identifiable cultural policy in Nova Scotia. It is important for the Department of Tourism and Culture, in consultation with the cultural community and a Cultural Policy Board, to develop a formal cultural policy document.
    - The provincial cultural policy should recognize the importance of cultural expression in all its forms, arts and culture in the economic and social life of the province, arts and culture education, the arm's length principle and peer evaluation, community input, and the role of individual artists in the creation of a living culture.
- **Cultural Federations of Nova Scotia:**
    - A restructured CFNS is key to the next stage of cultural development in Nova Scotia.
    - An Operations Committee consisting of the executive directors of the member federations should be formed. This Committee should be responsible for hiring an office manager who would be responsible for the administration of shared facilities.
    - A restructuring of the CFNS should be implemented with a view toward making it more representative of the cultural community.

- Funding for Cultural Production:

  - In light of the economic importance of culture, provincial funding in support of cultural production should be increased to at least meet the average level experienced in other provinces. Freezes on operational funding, which have been in effect in some cases for a decade, should be lifted.

  - Appropriate levels of provincial funding for cultural production should be based on per capita expenditures and on a percentage of the overall provincial budget. The Government of Nova Scotia should increase its expenditure on cultural production to a minimum of one half of one percent of the provincial budget.

- Arm's Length Funding:

  - The establishment of an arm's length funding mechanism for the arts in Nova Scotia is a priority.

  - Such an arm's length mechanism should be characterized by the following:

    - representation by various regions, disciplines, and cultural groups;

    - selection of representatives from these constituencies for juries;

    - low administrative costs;

    - support for both amateurs and professionals.

  - This arm's length funding structure must be responsive to the specific needs of the Nova Scotia arts community. An existing structure cannot simply be transplanted from another province.

  - All project grants for individuals and organizations should be determined through a peer review system administered by the arm's length agency.

- **Cultural Foundation:**
  - A Cultural Foundation should be established which would receive funds from the Department of Tourism and Culture, raise funds from private and corporate sources, serve as trustees for an endowment fund and allocate funds to a Cultural Policy Board grant programme.
  - In order to create a truly arm's length agency, the province should amend the Cultural Foundation Act.
- **Grants to Individual Artists:**
  - Increasing funding to individual artists should be a priority of the Government of Nova Scotia.
  - This funding should be administered through a peer review process by an arm's length agency.
- **Community Arts Councils:**
  - Provincial support for community arts councils should be demonstrated through the introduction of an operating grants programmes.
- **Cultural Policy Conferences:**
  - Cultural policy conferences can be an important vehicle for channelling advice and public input to the Minister.
  - Conferences should be held regularly. They should be initiated by the Cultural Policy Board and supported financially by the provincial government.
- **Arts education:**
  - There is a universal concern among the cultural community regarding the poor state of arts education in the schools. The province should address this as an urgent priority, giving consideration to implementing compulsory courses in the arts to be taught by qualified specialists.

- **Status of the Artist:**
  - The province should begin work on developing Status of the Artist legislation.
- **Cultural Statistics:**
  - Statistical information regarding the current economic impact of the arts and cultural industries is not available for the Province of Nova Scotia. The province needs to improve its capacity for gathering this type of information and should undertake a comprehensive study of the economic impact of the arts in the province.

5.3.3 New Brunswick

5.3.3.1 *Final Report, Premiers' Advisory Committee on the Arts,* New Brunswick, 1989

The Province of New Brunswick's Advisory Committee on the Arts was formed with a mandate to:

- *"act as a representative of the arts community and to express its views to the provincial government;*
- *establish a consultative process with the arts community to provide for the expression of its views and concerns regarding the role of the provincial government in the field of cultural development;*
- *advise the Premier on policies pertaining to cultural development."*

Main Recommendations:

- That the status of artists and craftspeople be re-defined taking into consideration the realities of their employment. That they should be granted treatment similar to fishermen and farmers, as reflected by the special circumstances of the situation and their cultural and economic significance.
- That the significance of the arts be recognized by all related government departments and that budget allocations be set aside for assisting the arts.
- The formation of a new government agency to initiate, direct and co-ordinate arts-related programmes.

- Establishment of an Arts Board to ensure peer evaluation into arts programmes.
- That arts education be redefined so that teacher training and curriculum reflect the valued status of arts in our society.
- Redefinition of community development and a subsequent reconstitution of the Cultural Development Branch of the government.

5.3.4 Prince Edward Island

5.3.4.1 Report on Economic Impacts and Opportunities in the Cultural Industries of Prince Edward Island, DPA Group Inc., March 1988 (Executive Summary)

This study was carried out at the request of Communications Canada and the P.E.I Department of Community and Cultural Affairs.

The mandate of the study was as follows:

> *"to determine the impact of the cultural industries on the economy of Prince Edward Island... to determine future development opportunities for these industries; establish the extent of any possible relationship between the cultural and tourism industries; prepare an inventory of the various industrial sectors."*

The cultural industries were defined to include literary arts, performing arts, visual arts, arts education, crafts, film and video, sound production, heritage institutions and festivals. Excluded were radio and television broadcasting, newspapers, agencies of the federal government, retail outlets other than those within the crafts sector, schools and libraries.

Main Findings:

- **Economic Impacts:**
  - The cultural industries have a significant total impact on the economy of the province. Direct sales in 1986 were estimated at over $21 million with indirect and induced impacts at $14 million. Total jobs resulting from the cultural industries in P.E.I were estimated at 3,200.

  - The cultural industries are characterized by an informal business structure reflected by data which show 75% are unincorporated, 60% operate out of the owner's home or workshop, 75% sell directly to consumers rather than through external distribution and retail systems.
  - Optimism regarding future expansion or growth.

- **Strengths:**
  - A core of professionals within each sector.
  - A substantial brand name recognition for P.E.I cultural products including Anne of Green Gables, Charlottetown Festival, Birthplace of Confederation and Cavendish.
  - Strong volunteer base.
- **Constraints:**
  - Failure of industrial vision and leadership in most sectors. Without industrial organization there is no focal point for development activities, no source of support for individual operators, no central programming in such areas as product development, marketing, business development, new technologies, and so on.
  - Lack of corporate strength and resources within individual operations.
  - Insufficient attention to market expansion and promotion.
  - Inadequate provision for training and development.
- **Strategies for Development:**
  - Recognition by government of the importance of the cultural industries.
  - Improved and targetted marketing, including a focus on brand-name recognition.
  - Incentives for entrepreneurial development within each sector.
  - Increased government funding for marketing, product development and training.

- Special emphasis on education and training.

5.4 REGIONAL/MUNICIPAL STUDIES

5.4.1 Metropolitan Toronto

5.4.1.1 *Metro's Role in Arts and Culture: A Discussion Paper,* 1992

This discussion paper, based in part on extensive community consultation with members of the the Metro community, is the first step in the development of a regional arts and culture plan for Metropolitan Toronto. The paper examines the Metro Toronto government's role in arts and culture and the history and future directions of arts and culture in Metro.

Main Findings:

The main concerns which arose out of the community consultation process include the following points:

- **Facilities:**
  - Arts organizations need space that is affordable, secure, accessible and suitable and they need information on the availability of arts spaces, including publicly-owned spaces.
  - Arts space is concentrated in downtown Toronto.
  - There is a need for government assistance in developing a capital grant programme to assist with facility development.
  - Difficulty exists in developing spaces where artists can both work and live; financing mechanisms, building code constraints, property tax reassessment after renovation, zoning conflicts and the treatment of artists as if they are businesses all present obstacles.
- **Arts Education:**
  - Better arts education is viewed as a means of improving the status of Metro artists. The role of arts schools and society, better links between teachers, and funding resources are the main issues in the area of arts education.

- **Access by Ethno-Racial and Aboriginal Communities:**
  - Ethno-racial and aboriginal communities were found not to have the same access to services as majority groups.

5.4.1.2 *The Arts and Economic Development*, prepared for the City of Toronto by the Toronto Arts Council, February, 1992

This paper provides an overview of the arts in Toronto and the economic impact this sector has on the economy of the City. It clearly demonstrates the significant roles arts and culture can play in economic life.

Main Findings:

Among the most significant findings of the paper are the following:

- Every dollar of non-profit arts revenue spins off another $3.00 in spending. This is a very substantial economic impact.
- Half those employed in the arts and arts-related industries do not receive their initial training in the not-for-profit arts sector.
- The number of trained personnel in the communications/information sector may not keep pace with the growth of the sector; the arts sector may be able to provide workers who have the skills to work effectively in this area.
- The arts community supplies 22 million hours of leisure-time activity and entertainment to residents and tourists. The City of Toronto pays 4% of the cost.

5.5 UNITED STATES STUDIES

5.5.1 *The Modern Muse: The Support and Condition of Artists*, C. Richard Swain, Ed., American Council for the Arts, 1989

This collection of papers stemmed from an American Council for the Arts conference on the same subject. The papers examine the historical change which has occurred within the arts labour market and conditions of artists in the United States. The following papers were selected as most relevant to the Nova Scotia Arts and Culture Sector Study and provide a useful comparative context:

5.5.1.1 Assessing the Artist's Condition: Some Qualitative Issues, John Robinson

Main Findings:

- According to criteria established by the National Endowment for the Arts, artists comprise about 1.3% of the total labour force and in excess of 10% of the professional-technical occupations work force.

- More than 33% of artists in the work force are classified as designers, while sculptors, musicians, composers, painters, architects, photographers, actors, and directors constitute between 6% and 13%.

- The proportion of individuals in artist occupations increased by 62% between 1970 and 1982. The total work force in comparison, grew by 25% and the number of professional-technical workers grew 52%.

- Female artists earn substantially less than male artists.

- Despite the overall increase in the artist work force, real earnings declined by 37% during the 1970's. This is compared to a decrease of 8% for professional-technical workers.

5.5.1.2 *The Artist's Condition From the Regional Perspective: The Outlook From the Midwest,* C. Lynn Cowan

This paper provides an examination of the status of artists in a regional setting, an issue identified in many Canadian studies. The paper is based on data provided by Arts Midwest, an arts organization serving the Midwestern United States.

Main Findings:

- 82% of the artists surveyed in the Midwest area worked full-time at their art.

- The 18% who worked less than full-time did so by choice.

- The average salary of the artists surveyed was $26,700 and was projected to increase slightly faster than inflation.

- 88% were covered by health and disability insurance.

- The artists surveyed were well educated; 18.5% had some college experience, 29.8% had a college degree and 41.1% had an advanced degree.

5.5.1.3 *Forecasting Artist Employment to the Year 2000*

This paper examines the historical and current labour force data on various artist occupations and projects employment figures until the year 2000. The data suggest trends similar to those projected in Canada of an overall increase in the size of the arts labour force. While employment is expected to grow at an above average rate, it is not expected to be as great a rate of growth as the 1970's and early 1980's.

5.5.2 *The Artist Alone: Work-Related, Human and Social Service Needs - Selected Findings*, Joan Jeffri, Joseph Hosie and Robert Greenblatt[2]

The report was the first in a series of in-depth studies into the arts labour market organized by the Research Center for Arts and Culture at Columbia University and the New York Foundation for the Arts. It focuses on profiling the respondents and examining issues such as health insurance, life insurance and pensions.

The mandate of the overall study was as follows:

- *to gain a better understanding of the work-related, human, and social service needs of artists;*
- *to collect and disseminate information to assist organizations, agencies and individuals in meeting those needs;*
- *to provide important insights into the integration of artists into what some people call the "real world" by looking at artists' relationships to culture, to institutions and to society.*

Main Findings:

- Consistent with averages for the general population, approximately 77% of respondents had some health or medical coverage because a high percentage do not earn the major portion of their income as artists.
- Over 95% of those artists surveyed had at least some college education; 59% had some graduate school education.
- Consideration was required for the costs involved in making art.
- Need for help with taxes, credit, mortgages, and loans.

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[2] This article appeared in the Journal of Arts Management and Law, Vol. 17, No. 3, Fall 1987

- Need for inexpensive health and life insurance.
- Problems of finding, buying, and renovating living and work space.
- Need for growth in arts education.

5.5.3 *Between Extremities: the Artist Described,* Joan Jeffri and Robert Greenblatt[3]

This report details the second project undertaken by the Research Center for Arts and Culture at Columbia University and the New York Foundation for the Arts which looks at the problems of defining artists.

Main Findings:

- Almost 78% of respondents to the survey listed their primary occupation as "artist," although only 26% earned the majority of their livings as artists.
- 52% of those surveyed earned $2,000 or less from their art in 1987, although 93% considered themselves "professionals."
- "Recognition by peers as an artist" and "an inner drive to make art" were cited as the two most important criteria for considering someone a professional artist.

5.5.4 *Information on Artists - a Study of Artists' Work-related Human and Social Needs in 10 U.S. Locations,* Joan Jeffri, 1991

Following the two previously described pilot projects, the Research Center for Arts and Culture at Columbia University carried out this major survey of artists in ten U.S locations: Boston, Chicago, Dallas, Los Angeles, Minneapolis/St. Paul, New York City, Philadelphia, San Francisco, Cape Cod and Western Massachusetts.

The mandate of this project was as follows:

- *the implementation of a broad, national study to determine artists' needs and resources in work-related human and social services;*

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[3] This article appeared in the Journal of Arts Management and Law, Vol. 19, No. 1, Spring 1989

- *to gather additional information to facilitate better descriptions of artists in terms of their economic and professional status in different artistic disciplines and urban and rural settings;*
- *to cooperate and collaborate with local arts service and artists' service organizations in each of the 10 locations to make this information accessible and useful to them;*
- *to take the mystery out of the survey process and data gathering mechanisms in order to enable organizations in each location to make connections between data and the creation of new programmes and to modify existing programmes.*

Main statistical findings:

- **Gender and Age:**
    - Of those responding, 43% were male, 57% female.
    - The mean age of respondents was 39, the median 37.
    - The mean age when they began training for their art was 15.7, the median was 16.
- **Income:**
    - Of those surveyed, 83% earned money through their art, and 50% said this money covered their art-related expenses.
    - In order to support themselves, 77% of respondents needed to work at another job.
    - About 28% of respondents earned their major income in non art-related occupations, 27% earned their major income as artists.
    - In 1988, 79% of the artists surveyed made $12,000 or less from their work as an artist.
    - In 1988, 61% earned a total gross income of $20,000 or less, 24% between $20,000 and $30,000, 15% between $30,000 and $40,000 and 10% over $40,000.

- **Education:**
  - The vast majority of artists have at least some college experience; 16% of the respondents had some college experience, 42% had a college degree, and 38% had received a graduate degree.
  - Of the responding artists, 64% had received a formal degree in the arts.
- **Legal Services:**
  - One half of respondents were in need of legal advice one to three times within the last three years. Legal need fell into the areas of taxation, contracts, copyright, payment for work, bargaining, negotiation, space and real estate.
- **Financial Services:**
  - Almost half (46%) of respondents could have used financial advice one to three times within the last three years. Need fell into the areas of taxation, record keeping, financial planning, setting up books and management expertise.
- **Zoning and Ownership:**
  - The majority of artists' work space (60%) is located in buildings zoned residential, 15% work in space zoned commercial and 10% mixed use.
  - Artists are more likely to rent their work spaces; 57% of responding artists rent, while 32% own their work space.
- **Health:**
  - Of the artists surveyed, 82% had some health or medical coverage.
  - Of those artists who had health or medical coverage, 33% obtained coverage through their employers, 28% through themselves, and 17% through their mates.
- **Retirement:**
  - At least one retirement plan is held by 44% of respondents.

Main Comments by Artists:

- Service and Training Needs:
  - There is a need for information regarding how to establish non-profit and umbrella organizations.
  - Artists require information to enable them to keep informed of residence opportunities and gallery relationships.
  - Artists would like to see the provision of practical advice from arts schools, continuing education programmes and evaluation of arts education programmes.
  - Artists would benefit from services which provided training in marketing, money management, career and retirement counselling.
  - There is a need for artists to have access to information on health hazards, professional practices and arts opportunities in other cities.
  - Artists would benefit from financial services such as low interest loans, discounted supplies and services. Funding requirements are often too high or too difficult to meet.
- Health, Pensions and Welfare Needs:
  - The lack of, or high cost of retirement plans, disability insurance, worker's compensation and fine art insurance is perceived as a problem by artists.
- Space Needs:
  - Work and living space is too expensive and unavailable.
  - Exhibition space is inaccessible.
- Legal Services:
  - Artists require access to legal services and information regarding substance toxicity, copyright, plagiarism.

- **Discrimination:**
  - Artists reported being discriminated against on the basis of their profession, gender, sexual orientation, race, politics, and age.
- **Community Involvement:**
  - Artists feel exposing children to more art and artists in public schools will help to increase cultural literacy.
- **Women's Issues:**
  - Particular attention should be paid to issues relating to the special circumstances of women artists such as maternity leave, child care, flex time, competition and late bloomers.
- **Support Groups and Networks:**
  - In order to fight isolation, artists would like to see the formation of crisis groups, business networks, and alternative artists spaces.
- **The Artist in Society:**
  - Artists are not taken seriously because of a lack of recognition for the importance of art.

6. CONCLUSIONS AND RECOMMENDATIONS

Photo from "Dancin' on a Swing" (1987), courtesy of Performing Arts Section, Cultural Affairs Division, Department of Tourism and Culture.

6. CONCLUSIONS AND RECOMMENDATIONS

This chapter presents conclusions and recommendations of the consultants based on the quantitative and qualitative research conducted in this Nova Scotia Arts and Culture Sector Study.

These findings are presented in two sections:

6.1 An assessment of the opportunities and needs of the sector;

6.2 Recommendations on priorities, programmes, initiatives and activities to ensure the economic development of the arts and culture sector.

6.1 OPPORTUNITIES AND NEEDS ASSESSMENT

In this section we draw conclusions from the surveys of artists and arts organizations (chapters 2 and 3) in the context of:

- the qualitative insights of individual artists as expressed in qualitative questions in the surveys (chapters 2 and 3) and in the focus groups (chapter 4);
- comparable data in other studies as reported in chapter 5;
- the experience, knowledge and judgement of the consultants who are specialists in the arts and the culture sector.

Opportunities are identified in section 6.1.1 under the following headings:

6.1.1.1 Size of the Arts and Culture Sector
6.1.1.2 Economic Contribution of Sector
6.1.1.3 Economic Dynamism of Sector
6.1.1.4 Linkage with Tourism

Needs are identified in section 6.1.2 under the following headings:

6.1.2.1 Full-time employment
6.1.2.2 Market Development/Expansion
6.1.2.3 Training
6.1.2.4 Research and Development

6.1.1 Opportunities

6.1.1.1 Size of the Sector

The arts and culture labour force as defined in this study is a large and growing sector. The size of the sector creates both opportunities and needs. Here we estimate the size of the sector.

The arts and culture sector of Nova Scotia, as defined by this study, included the literary arts, visual arts, performing arts, crafts, media arts/sound recording and non-governmental heritage. Excluded were those employed in broadcast media, newspapers, libraries and teachers in primary and secondary schools. Also excluded were those involved in advertising and illustrative design, product and interior designers, translators, interpreters and camera operators even though these latter occupations are included in the "Artistic, Literary, Related Statistics Canada Standard Occupational Classification." The Nova Scotia Arts and Culture Sector Study includes full-time and part-time artists, which differentiates it from the national study conducted by Ekos Research, Rethinking The Status of the Artist. Taking these differences in definition into account, one may provide only a reasonable estimate of the size of the arts and culture sector in Nova Scotia. We have approached this challenge by two methods:

1. The Nova Scotia Mailing Lists

   We reviewed the mailing lists of artists provided by the various arts and cultural federations and associations of Nova Scotia as well as other lists of the Department of Tourism and Culture and those not on lists who contacted the consultants upon learning of the study through media coverage.

   A total of 3,440 individual artists were identified in this manner. There are undoubtedly additional artists who were not on our mailing lists. Balanced against this to some degree is the fact that not everyone on the mailing lists was an artist as defined by this study.

2. Comparison with the Ontario Data

   We have carefully analyzed the *Occupation: Artist - A Profile of the Demographic, Economic and Employment Characteristics of Artists in Ontario* study, prepared by the Ontario Arts Council.

From the total of 66,805 artists identified for Ontario by Statistics Canada, we have subtracted product and interior design (9,830), advertising and illustrating design (11,280), half of photographers, camera operators, "other, not elsewhere classified" in fine and commercial art, photography sector (2,953), radio/television announcers (2,345), half of "other, not elsewhere classified" in performing, audio-visual sector (1,080), translators, interpreters (2,540) and half of "other not elsewhere classified" in writing sector (315). This leaves a total of 36,462 artists, or 0.51% of the total Ontario population aged 15 and older.

Using 0.51% as a ratio of the 694,000 population of Nova Scotians aged 15 and over in April, 1992 (Statistics Canada, The Labour Force, 71-001) produces an estimated total of 3,548 artists in Nova Scotia. This number needs to be adjusted upward to include the non-government heritage resources sector which is excluded from the Ontario data.

We therefore estimate the study population -- Nova Scotia's arts and culture labour force -- to be 3,700 - 4,000.

Regarding the prospects for the growth of the arts and culture sector in Nova Scotia, one may observe a number of positive indicators:

- A projected growth in arts and culture income. Some 36.5% of artists believe they will earn 100% of their income from arts and culture sources five years from now compared to the current 29.7% and the 26.8% of five years ago.

- The general aging of the population and the fact that artists tend to be in older age categories is positive in that artists' income is generally shown to increase with age.

- Optimism among individual artists regarding future market potential.

- Projections by organizations for more members, volunteers, tours and sales outside Nova Scotia.

Balanced against this is a feeling by 45% of individual artists that "there are few opportunities for me to advance my career in arts and culture in Nova Scotia."

6.1.1.2 Economic Contribution of Sector to Nova Scotia

The survey data provides a baseline of information on the income earned by the arts and culture sector and its expenditures within the province. From this data, it can be seen that this is a significant sector which makes a contribution to the economy, particularly in Halifax but also in the less populated areas outside Halifax.

This report does not project the economic impacts of the arts and culture sector, including indirect and induced impacts. Rather, it uses the survey data generated by this study as the basis for an extrapolation of direct income, salaries and expenditures attributable to the arts and culture sector in Nova Scotia.

The data which follow are based on our analysis of the size of the sector: that the survey respondents account for about 20% of the total arts and culture sector and that the respondents are representative of the sector as a whole. The 20% figure is actually conservative in the context of an estimated number of artists ranging from 3,700 to 4,000. Even if the total population of artists were limited to the 3,256 to whom questionnaires were delivered, minus those who received a questionnaire but who nonetheless did not fit this study's definition of "artist," the 670 respondents would account for close to 20% of the total.

Taking the assumptions above into account, the data extrapolated are as follows:

Individual Artists	
. Expenditures	$35 million in direct purchases in Nova Scotia
. Net Income	$8 million to individual artists from arts and culture activities.[1]
Organizations	
. Salaries, Wages and Benefits	$51 million to employees of organizations
. Other Expenditures	$70 million in direct purchases in Nova Scotia
Combined	**$164 million**

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[1] Net income is derived from $43 million in gross revenue from arts and culture activities less their arts expenditures of $35 million (as reported on the individual surveys).

A comparison of the data regarding the expenditures of individual artists within and outside Halifax demonstrates that the Halifax area achieves a particularly high degree of economic benefits. This is confirmed by data which reveal that:

- Expenditures by Halifax area artists averaged $15,125 per year, compared to $8,725 for non-Halifax artists.
- Nearly 87% of the expenditures of Halifax area artists are within Nova Scotia compared to 79% for non-Halifax artists.

The fact that Nova Scotia's arts and culture sector contributes an estimated $164 million to the province's economy in salaries and other direct expenditures alone indicates a significant opportunity for investment. The contribution of the sector to tourism and community development should be analyzed in a future study along with the economic impacts of re-spending through the economy.

6.1.1.3 Economic Dynamism of the Sector

The arts and culture sector is an especially dynamic economic sector and this in itself creates opportunities for economic growth. The economic dynamism is particularly evident in the following four findings from survey data:

(i) **The high proportion of the arts and culture labour force which is either self-employed or small business owners.**

About two-thirds of survey respondents were self-employed or free-lancers with respect to their arts and culture activity and about 18% are small business owners. These represent a very high percentage of the total arts and culture population. In Ontario, for example only about 25% of artists, as defined by Statistics Canada, aged 15 and over, were self-employed as opposed to earning income from salaries and wages. Self-employment is very closely related to entrepreneurship and willingness to take risks. This contributes to economic dynamism. Those disciplines with particularly high proportions of self employment are: Visual Arts (83%), Literary Arts (74%) and Crafts (68%). Those disciplines with particularly high small business ownership are: Crafts (40%) and Media Arts/Sound Recording (32%). Both self-employment and small business ownership are more likely to lead to the creation of wealth through entrepreneurship.

(ii) The high education levels of members of the sector

Nova Scotia artists are exceptionally well educated relative both to the levels of education of the province's labour force as a whole and the level of education of the arts labour force in the Province of Ontario[2]. Higher levels of education can mean increased ability to adapt to change. It can also indicate that Nova Scotia's arts and culture labour force is potentially well equipped for the demands of a post-industrial society where *the communication of meaning* (which is the purpose of works of art) may have greater value than *the production of commodities*.

(iii) The flexibility of individuals in their choice of career paths and methods of earning income

The survey data demonstrate that 72% of artists identified at least one secondary artistic/cultural activity and that, on average, artists have 2.4 secondary activities in addition to their main artistic activity. This indicates that the province's arts and culture labour force is multi-skilled and has both the need and the desire to generate income from more than one source.

The flexibility to change career paths and/or to practise more than one skill at a time can lead to economic success because the members of this labour force are able quickly to respond to changes in the marketplace. In contrast, the labour force generally, and even its professional component, is comprised of individuals educated or trained for specific jobs who require considerable re-training and re-orientation to respond to changes in the marketplace.

(iv) The optimism of the sector

This is a sector with many problems, including: low remuneration levels relative to educational attainment; inadequate physical facilities; and great difficulties in working with traditional sources of business financing (to name but a few examples). Nonetheless, in the midst of the 1992 recession, many of Nova Scotia's artists were optimistic about their future arts and culture income: most artists believe they will derive a higher proportion of their total income from arts activities in five years than they do today; many artists (58%) believe that they can market their products to other provinces and to the U.S. (38%) and internationally.

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[2] Please see 5.3.1.1, a review of *Occupation: Artist - A Profile of the Demographic, Economic and Employment Characteristics of Artists in Ontario*, Ontario Arts Council, for education data on Ontario artists

This sense of optimism is in contrast to the findings of the Task Force on Professional Training for the Cultural Sector in Canada, which found evidence of a "deep malaise" within the artistic community, describing the state of mind of artists as "discouraged." The EKOS/LORD study of the museum labour market (1989) also identified "significant feelings of indifference, apathy and marginalization."

Optimism is closely related to entrepreneurship and may be seen as a source of the economic dynamism of this sector.

6.1.1.4 Link with Tourism

Tourism is one of Nova Scotia's most important industries. It is also the world's fastest growing industry. Cultural tourism -- by which is meant tourism with the objective of participating in the arts and heritage of a destination -- is a rapidly growing component of the tourism industry because it attracts high-income, high-education markets in the 45-65 age group which is the age group with sufficient disposable income and time for pleasure travel. With the aging of the large "baby boom" generation it will also be the largest market segment for the next 20 years.

Because culture and tourism are combined in one government department in Nova Scotia, the link with tourism represents both real and potential opportunity for Nova Scotia artists. At present, Nova Scotia tourists/visitors represent an average 12.4% of the audience/market for Nova Scotia artists. The portion of Nova Scotia tourists/visitors as part the overall market is highest for Craftspeople (18.2%) and Visual Artists (16.4%) and lowest amongst Literary Artists (7.8%) Figures on seasonal employment show that summer is the lowest season of employment for all sectors except Literary Artists, for whom summer is tied with winter as the highest period of seasonal employment. Winter is the highest period of seasonal employment for all sectors except Performing Arts, which has a slightly higher rate of seasonal employment in the fall. This indicates the most artists are not working during the peak summer visitor season when they could be significantly increasing their markets. Peak employment periods for artists correspond to peak attendance periods of the resident market.

According to the focus group participants, there is opportunity for greater co-operation with tourism through promotion of cultural tourism (in addition to "sea and scenery"), improved marketing of art products in tourist attractions including heritage sites, and providing more arts activities and performances during the tourist season. To fully capitalize on the potential of cultural tourism, additional programmes such as point-of-purchase tax-rebates and a cultural tourism strategic plan for each region will be required: the cultural tourism opportunities in Baddeck are different from those of Annapolis Royal.

6.1.2 Needs

6.1.2.1 More Opportunity for Full-time Employment

The arts and culture sector in Nova Scotia is characterized by an extremely high proportion of part-time artists. The table below shows the distribution of part-time artists across the arts disciplines and by Halifax area and non-Halifax regions.

Sector	Full-Time	Part-Time
Total	48%	52%
Literary Arts	36%	64%
Visual Arts	55%	44%
Performing Arts	50%	50%
Crafts	36%	64%
Media/Sound Recording	62%	38%
Halifax Area	49%	51%
Non-Halifax	47%	53%

The Ontario labour force by way of contrast includes more than 77% of artists who work full-time, which is slightly less than for the labour force as a whole (80%). For "painters, sculptors and related artists," 64% worked full-time while 62% of actors worked full-time.

There are several possible explanations for this phenomenon:

- There may have been a large influx into the arts labour force after 1985 which is not reflected in the Ontario data but is reflected in the Nova Scotia data. The resultant competition has led to a large part-time component in the arts and culture sector.

- Another possible explanation is that the Nova Scotia economy in general is more seasonal and/or dependent on part-time labour than Ontario's and this is reflected in the arts and culture labour force as well.

- The lack of full-time employment opportunities stemming from the current recession may furnish another explanation.

- Artists may choose to work part-time because they prefer it.

- Artists may work part-time because there is not a sufficient market to provide a full-time income for 3,700 to 4,000 people in Nova Scotia's arts and culture labour force.

When we looked at the size of Nova Scotia's arts and culture labour force relative to the population earlier, we found that it was broadly comparable to that of Ontario and indeed somewhat smaller than the proportions cited in the 1991 U.S. study (see section 5.5.4). Significantly, the U.S. study indicated an even greater reliance of artists on non-arts income: 77% of respondents said they needed to work "at another job."

A careful analysis of the income figures presented in chapter 2 yields a number of interesting points:

- Part-time artists have higher total **average** annual incomes ($28,411) than full-time artists ($26,647). The average for all Nova Scotia artists is $27,760. But part-time artists have lower **median** incomes. Part-time artists are clustered at both the low and high ends of the income spectrum. For each income category from $15,000 to $45,000, there is a higher percentage of full-time artists than part-time artists.

- Nova Scotia artists' **average** incomes exceed those for Ontario artists.

- On average, all Nova Scotia artists have a large non-arts component in their personal incomes (irrespective of whether they are full-time or part time artists). Only 30% of the province's artists derive 100% of their income from their art. And, on average, artists derive 46% of their income from their arts and culture activities.

- Part-time artists are less frustrated by the need to earn income from non-arts sources (44% full-time and 36% of part-time artists reported being frustrated) and are more likely to choose to live and work in Nova Scotia than were full-time artists (75% of full-time artists would choose to live in Nova Scotia again compared to 82% of part-time artists).

- Full-time artists are more likely to see the need for training in business skills and advanced technology whereas part-time artists need training in arts skills/techniques.

The larger picture of the economic life of Nova Scotia's arts and culture sector which emerges from this study is that the market for the arts in not sufficiently developed to maintain a healthy ratio of full-time to part-time workers in the arts labour force (which is of an average size relative to the population). Nonetheless, as a result of the resourcefulness and entrepreneurship of the province's arts and culture sector in combining various types of arts and non-arts income, the average income is 12% higher than that of the average income of employed persons in Nova Scotia and higher than the average income of Ontario artists.

The threat in this situation is decline in the quality of artistic product. Artists need to devote their full time to develop the skills, craft and ideas that lead to art of great quality. This does not mean that every individual who chooses to become an artist has a "right" or an "obligation" to work full-time at his/her art. Nor does it mean only full-time artists can produce art of quality. It does mean that for the sector as a whole (like any sector of the economy), the quality of artistic and cultural products will decline or will not be maintained at a competitive level of quality if there are not enough people working at it full-time.

Given that the arts more than any sector is dependent on **quality** for success, and given the opportunities inherent in the size of the sector, its contribution to the economy, its economic dynamism and arts and culture's link with tourism -- **the need for creating greater opportunities for full-time employment (or income through self-employment) in the sector must be seen as the single greatest need.**

6.1.2.2 Market Development and Expansion

Market development and expansion is the fundamental requirement for the health of the arts and culture sector. Without market development and expansion, there will not be the economic basis for increasing full-time employment in the sector and for maintaining quality.

Market development is always a challenge for the arts everywhere. However, it is particularly challenging in Atlantic Canada where the local market -- especially outside Halifax and other large cities -- has less disposable income than in other regions. This means that export is a particularly important strategy for Nova Scotia's arts and culture sector.

It is significant that survey respondents were optimistic about future opportunities for export and realistic in their calls for assistance to tap this potential (see section 2.8.2).

Trade experts make the distinction between those businesses that are "export willing" and those that are "export-able." What this study shows is that a significant portion of Nova Scotia's arts and culture sector is "export willing" but requires considerable help to become "export-able."

Help is needed in the following areas:

- small business loans such as are available to industry (artists don't qualify) to finance development of new markets;
- training and advice for both artists and organizations on how to target and sell to national and international markets;
- access to good agents, dealers and publishers who operate in new markets;
- assistance in making direct contacts with potential new markets;
- eliminating problems at the U.S.-Canada border (immigration problems for performers, duties on craft items, etc.).

6.1.2.3 Training

The need for training is acknowledged by the sector both in the responses to the survey questions and in focus group discussions as described in chapter 4. The following table below shows the type of training artists and cultural workers in each discipline think would be beneficial to their arts and culture activities.

PREFERRED TYPES OF TRAINING BY DISCIPLINE

	Art skills/ techniques	Business skills in discipline	Advanced technology	Other
Literary Arts	49%	40%	32%	19%
Visual Arts	65%	47%	33%	14%
Performing Arts	51%	41%	41%	14%
Crafts	58%	61%	37%	10%
Media Arts/ Sound Recording	44%	28%	78%	6%
Halifax Area	53%	44%	42%	13%
Non-Halifax	56%	43%	35%	14%
Average	54%	43%	39%	13%

It may also be noted that there is only a fair satisfaction rate with existing training programmes. For example while 79% of artists have taken courses, only 46% believe their income has been enhanced by training. This could indicate a need for better training, more relevant to economic needs.

The focus group sessions indicated a need for more training related to: business, marketing and board development to be offered outside Halifax.

A critical need is an integrated approach to providing businesss training with basic arts and craft education. In a situation where the majority of graduates will likely be either self-employed or owners of small businesses, art students are not receiving instruction on business management.

Interviews with the Ontario College of Art, the University of Toronto School of Architecture, both in Toronto, as well as with the Nova Scotia College of Art and Design led the consultants to conclude that three of Canada's major university-level visual arts programmes lack courses related to either "professional practice" or business. Such courses, when available, are part of the extension programme.

Sheridan College Art Department in Oakville, Ontario offers courses related to business and professional practices and the arts as part of its regular programme. There are three business courses designed specifically for third year students in the following disciplines: Craft and Design (professional and business practices courses), Applied Photography (professional practices and portfolio preparation courses), Computer Graphics (business practices course), and Graphic Design (small business management course).

NSCAD offers non-credit professional practices courses through its Continuing Education Department. These courses include Tax and Accounting, Marketing, and Legal Considerations. The Marketing course has been very successful and popular among the craft community. There are plans to develop a marketing course tailored to visual arts at some point in the future. Tax and Accounting is taken by equal numbers of visual artists and craftspeople. The Legal Considerations course is taken by more visual artists, as it tends to focus on such topics as access to reasonable work space and other such topics which are more relevant to the working conditions of visual artists.

On the heritage side there is a need for training in the client service and management aspects of heritage sites for cultural tourism purposes.

There is no film school in Atlantic Canada. Nor is there the equivalent of a Cultural Federation to provide "mid career training." Lack of professional training in this area was identified by the sector as an urgent need. Training is currently provided by the Atlantic Filmakers' Cooperative. There is a need for training in the economics of film and sound production both for arts and culture workers and for the financial sector.

Specific programmes to address these training issues will be discussed in section 6.2.

The table which follows lists post-secondary institutions in Canada and Nova Scotia which offer professional arts training.

POST-SECONDARY INSTITUTIONS OFFERING PROFESSIONAL ARTS TRAINING

Discipline	Total in Canada	# in N.S and Description
Arts Administration	15	0
Crafts	46	1, Nova Scotia College of Art and Design, Bachelor/Masters Degree, Crafts - Textiles, wood, jewelry, ceramics
Dance	22	0
Interdisciplinary Arts	8	1, Nova Scotia College of Art and Design, Intermedia, BFA, MFA
Literary Arts	28	0
Media Arts	38	0
Museology	10	1, University College of Cape Breton, Community Studies, Museum Studies Option
Music	88	3, Acadia, Bachelor, Dalhousie, Bachelor, St. Francis Xavier, BA/Music, BA/Music (Jazz studies), Dip. in Jazz pedagogy
Theatre	30	2, Acadia University, BA Major Theatre Studies, Dalhousie University, BA/Cert.
Visual Arts	113	2, Nova Scotia College of Art and Design, BA/MFA, Acadia University, BA

Source: Art is Never a Given, Professional Training for the Cultural Sectors in Canada, 1991

6.1.2.4 Research and Development

We have earlier identified a link between the quality of artistic product and full-time employment. In the arts and culture field, it is well established that quality product is correlated to "research and development." Research and development may be distinguished from training in the following way:

- Training provides information and skills toward performing an existing job or task better. Therefore, in the culture sector, we may speak of business training for the artist, training in marketing or training in new technologies that may help the artist to produce a better craft or art product (or performance) or to produce the product (performance) more efficiently.

- Research and development addresses the core issues of:

    - the quality of the artistic product; and

    - the creation of new ideas.

  Research and development may involve the artist or performer in taking courses, in study trips, in independent research or it may involve the interaction between artists and curators (or performing artists and critics).

Around the world, research and development costs are costs shared by the artists and by government (which is indeed parallel to what is the case in industry).

In most provinces in Canada, in many American states and in most European countries, grants to artists and cultural institutions that are for "research and development" are administered by an arts council at arm's length from government which utilizes some type of peer review system. The Canada Council serves this function at a national level in Canada. The National Endowment for the Arts and the British Council are its respective U.S. and British counterparts. Most provinces have an arts council; for example, the Ontario Arts Council provides grants to Ontario's culture sector. Quebec and New Brunswick have recently established arts councils. The lack of an arm's length agency mandated to help develop quality in the arts in Nova Scotia means that the province's arts and culture sector is disadvantaged relative to other provinces. A provincial arts council could, for example:

- lobby effectively for additional funds for research and development grants to artists and arts organizations;

- implement a peer review system, which is an effective method of improving quality of art and performance;

- provide funding for more exhibition and performance opportunities for artists.

6.2 RECOMMENDATIONS ON PRIORITIES, PROGRAMMES, INITIATIVES AND ACTIVITIES

In this section, the consultants present recommendations for specific programmes and initiatives that will both strengthen the development opportunities of the province's arts and culture sector and address the needs identified in section 6.1.

As a result of the extensive focus group consultations reported in chapter 4 and the thoughtful responses made to the qualitative questions on the survey (as reported in chapter 2), we received a wealth of ideas from the province's artists and cultural workers which we have endeavoured to record in this study.

Here we highlight those programmes, initiatives and activities which in the consultants' judgement and experience are priorities for addressing the sector's opportunities and needs.

These recommendations are organized under the following headings as provided in the study Terms of Reference:

6.2.1 Market Expansion
6.2.2 Human Resource Development and Technological Innovation
6.2.3 Quality Development

6.2.1 Market Expansion

Market expansion is the top priority for Nova Scotia's arts and culture sector. Market expansion could be the single most effective way of improving arts and culture income, training for artists and quality of the sector. Indeed, without market expansion, it is difficult to see how specific government or private sector initiatives in these other areas could be successful in the long term.

Reviewing the many comments contributed by artists to the study process, readers will note that the majority recognize the need for market expansion and the need for help to successfully sell products or tours to markets outside the province. The data show (please see section 6.1.2.2) that Nova Scotia artists are "export willing" but require many types of assistance to become "export-able."

6.2.1.1 Disincentives to Market Expansion

To effectively help the sector to develop a market expansion strategy, government must acknowledge and address the many impediments to market expansion which exist. Chief among these are:

- **Duties on Export of Craft**

  Under the Free Trade Agreement tariffs on craft items are being phased out over 10 years. However, at present craft items exported to the U.S. do not share in the duty exemptions available for works of art. This creates expensive and cumbersome paperwork for craftspersons seeking to export their work. Study data show that the craft disciplines are among the lowest paid and therefore have the least capability to address this problem.

- **Border Problems**

  Canadian performers sometimes experience difficulty in entering the U.S.

- **GST / PST**

  Maximizing sales of art, craft and books to Nova Scotia's tourist and convention visitors is an important form of market expansion. We heard from numerous artists that the rebate process for GST and PST is too cumbersome and that the taxes therefore are a serious obstacle to sales to tourists. One very successful artist in King's County told us that sales were greatly reduced in his shop last summer despite a much higher number of visitors. The main reason was the high price with the new tax. Point of sale rebates to tourists is a critical issue.

- **Amusement Tax**

  The 10% amusement tax is regressive as applied to performing arts. It creates costly paperwork for performing arts organizations. Further, in most provinces and states, amusement tax is not applied to performing arts (but only to amusements). This may make pricing of the Nova Scotia product less competitive to visitors. The amusement tax should be removed from live performances.

- **Lack of Access to Business Financing**

  In order to expand to new markets, the sector requires the ability to obtain financing. This is equally true for the recording industry which seeks to distribute CDs in Toronto as to the craft producer who seeks to sell ceramics in Boston. Financial institutions are not prepared to lend money to market expansion ventures in the culture sector because they are seen as too "high risk." There are no government programmes to provide low cost loans or loan guarantees because the projects do not fit into existing "arts" categories or "small business" categories.

6.2.1.2 Cultural Tourism

Cultural tourism as discussed in section 6.1 presents a major opportunity to expand the market for the culture sector without necessarily leaving the province.

Lack of a cultural tourism strategy has led to:

- the culture sector feeling exploited by tourism;
- the tourism sector feeling let down by artists and performers, many of whom do not work at their culture and arts occupations in the peak tourist months (see chapter 2).

In our interviews, we learned of lost opportunities by both sectors from:

- lack of adequate facilities as in Baddeck, for example, where there is an exciting cultural festival that draws tourists and employs artists but is limited in its market reach because it is held in a school auditorium;
- lack of cultural tourism merchandising as in the shops of historic sites and communities (like Haliburton House in Windsor) which do not sell books by the authors being celebrated in the house;
- lack of packaging of festivals and events to focus the tourism and cultural and heritage resources of a community or region to create a "destination."

There is an urgent need to develop a regionally based Cultural Tourism Strategy on a community development model that will help the arts and culture sector to expand its markets within the tourists already visiting the province. This includes a programme of merchandising cultural products to tourist attractions and historic sites and packaging festivals and events to focus the tourism and cultural and heritage resources of a community or region to create a "destination."

Tourism marketing should incorporate cultural tourism into its marketing campaigns. The tourism industry needs to acknowledge that the province's arts and culture, properly marketed, will attract tourists and encourage them to stay longer. The recent CBC Anne Murray special is one example of the potential that exists for market expansion when culture and tourism join forces.

6.2.1.3 Facilities

For certain disciplines of the arts and culture sector, facilities are critical to market expansion.

For the film industry and related crafts (performers, set, hair, costume design etc.) the development of a soundstage could make a difference in both the number of local productions and in the number and magnitude of outside productions shot in Nova Scotia or co-produced with Nova Scotia film makers. A feasibility study should be conducted to assess whether or not a soundstage would contribute to market development and expansion and the size and type of soundstage required.

The high proportion of arts and culture workers who create and perform (or exhibit) in non-purpose built space seems to be high. Reference has been made to how in one case (Bras d'Or) lack of purpose-built facilities is an impediment to market expansion. This may be the case elsewhere. A study should be conducted in conjunction with the cultural tourism strategy to evaluate the need for purpose-built (or purpose-renovated facilities) in terms of economic benefit to the sector.

6.2.1.4 Marketing

As with the tourism industry, there are basically two ways of developing export markets for arts and culture:

- taking the arts and culture products to the market (as in travel trade shows);
- bringing the market to the product (as in familiarization or FAM tours).

The arts and culture sector will require assistance with both types of marketing.

Artists and organizations need assistance in introducing their products to the market. Federal grant programmes that support touring art exhibitions and performing art tours will be helpful. A partnership model in which federal and provincial governments participate along with the private sector is likely most appropriate.

Canadian consulates around the world and in major regions of the U.S. play a key role in promoting Canadian artists and performers. There is an opportunity for Nova Scotia's arts and culture industry to benefit from these special events and festivals particularly in such target markets at Scotland and the New England States.

The FAM tour model may be even more cost-effective. The province should consider a pilot project of bringing influential opinion leaders or "tastemakers" from target export markets to visit the province and meet with artists and performers. An arts and culture FAM tour could include such persons from targeted export markets as:

- arts journalists
- curators/critics
- dealers
- literary and theatrical agents
- gallery owners
- publishers
- directors of cultural and performing arts centres
- impresarios

The "Art Fair" model should also be explored. This is a method of cultural market expansion used extensively in Europe. Nova Scotia would periodically sponsor an "Art Fair" that features Nova Scotia art, craft and performing arts. The focus would not be the general public but to bring into Nova Scotia the dealers, agents and impresarios who make the decisions about booking exhibitions, performing arts tours and adding artists to their "stable."

There is also a need for a basic "made in Nova Scotia" label as a marketing tool for the arts and crafts. While the Designer Craft Council has a label programme for those who meet its high standards, there is an additional need for a more basic label to help all potential purchasers seperate the real "made in Nova Scotia" product and performance from imitators.

6.2.1.5 Cultivating an "Export Culture"

To develop new markets requires sustained effort. It is not achieved with one pilot project, one FAM tour or one marketing campaign. It requires a strategy and a commitment over time to that strategy by all partners. The partnership may be extensive including all levels of government, arts/cultural organizations and institutions, the "export-able" artists and cultural industries, the "export-willing" financial sectors and even corporate sponsors.

The cultivation of an "export culture" helps to sustain the commitment and the effort over a five to ten year period -- despite the inevitable failures, setbacks and disappointments.

By "export culture" is meant a "can-do" attitude to market expansion beyond Nova Scotia's borders. A good first step is in highlighting the success of Nova Scotia's professional artists like Anne Murray and Men of the Deep and the community-based performers such as pipe bands. It is recommended that government sponsor annual awards to honour the international export success of Nova Scotia's artists.

The availability of business training for all partners focusing on skills needed for export to various markets is also part of cultivating an export culture.

6.2.2 Human Resource Development and Technological Innovation

In section 6.1.2.3 there is extensive discussion of the potential for human resource development in Nova Scotia's arts and culture sector and the need for more relevant training and for access to training on a regional and discipline basis.

The issue of training and the related issue of technological innovation requires strategic planning. The data provided in this study will provide a base of information on the training needs and opportunities of the sector and its preferences that will be key to the strategic planning process. In this section of the report, we can point out some directions that will be useful to the planners.

6.2.2.1 Centres of Excellence

The arts and culture sector believe that high level or specialist training, particularly with respect to new technologies, is simply not available in Nova Scotia.

It is unrealistic to think that each province can provide for all its training needs in any economic sector. An approach which **stresses Centres of Excellence** allows each region of the country to specialize in training at an international level of excellence. The Banff Centre is an example of a centre which provides training and professional development to the entire country. The Nova Scotia College of Art and Design has the potential to develop in that direction for the visual arts and craft.

A performing arts centre could be developed at Baddeck in Cape Breton in conjunction with the creation of a facility that would meet the needs for an arts centre. A centre for training in "heritage arts," the "heritage industry" and restoration skills be established in Annapolis Royal. Again, there would be a link between tourism, culture and human resource development. Indeed, there is a potential link with market development as these centres of excellence begin to attract students and instructors from outside the province. It is recommended that the feasibility of establishing these centres be studied.

6.2.2.2 Business Training

The survey and focus group data indicate widespread recognition, particularly among visual artists and craftspersons, of the importance of business training or education in "professional practise". This type of training is offered only on an extension basis at NSCAD. It is recommended that curriculum be developed for business skills and professional practise as part of all courses of study.

6.2.2.3 Arts Skills vs. Advanced Technology

The table in section 6.1.2.3 demonstrates that the Nova Scotia arts and culture sector values training in skills and techniques above all other types and that it is only the media arts and sound recording sector that shows a keen appreciation of the need for training in advanced technology. This was reflected also in the focus group discussions. This is attributable to a number of factors:

- the high proportion of part-time workers in the sector;
- the strong Nova Scotia hand-craft tradition;
- the lack of a film school in Atlantic Canada;
- the higher dependence on advanced technology for success in the media arts and sound recording disciplines than in others.

This indicates that training in advanced technology is a strategic priority for one discipline at this time. As market expansion leads to more full-time work in other sectors, it can be anticipated that there will be a greater awareness of the benefits of advanced technology.

6.2.2.4 Mid-Career Training

The cultural federations are responsible for providing mid-career training to many of the arts and culture disciplines. As indicated elsewhere, there is a need for a federation or association to serve the music/sound recording industry.

It is recommended that a focussed study of the cultural federations be conducted to assess how the training and service role can best be delivered throughout the province; how the various federations can co-ordinate their training efforts and to assess the role of local community arts councils.

6.2.3 Quality Development

The arts and culture sector, more than any other sector of the economy, is dependent on quality and the creation of new ideas for its success. In the final analysis, arts and culture is about quality of product, quality of experience, quality of expression, and quality of life.

Quality development is crucially linked to improving the overall full-time employment levels in the arts and culture sector. Thus, quality is linked in a fundamental way to market expansion.

Research and development also plays a critical role in maintaining and improving the quality of arts and culture. Research and development is linked to education, but for the arts it involves such activities as: independent research; travel; cultural exchange at the regional, national and international levels; curatorial visits; experimentation; and criticism by knowledgeable experts in the field. The type of programmes that particularly help to improve quality are: drama festivals; competitions; exchanges with arts organizations elsewhere at a similar level; visiting curators and directors; artists in residence programmes; and curated exhibitions.

Governments across Canada and around the world encourage quality development for the arts and culture sector by initiating arts policies and administering programmes through an arm's length agency such as an arts council that utilizes a peer review system to prioritize resource allocation.

An alternative approach to be explored would be the creation of a specific not-for-profit organization to fund research and innovation in the arts and culture sector. This organization or agency could receive funding from a variety of sources such as the Department of Tourism and Culture, the Department of Economic Development and other public and private partners. The purpose of this initiative would be to encourage risk-taking and the creation of new ideas which are otherwise not affordable to individual artists and to arts organizations. This type of approach to research and development and quality development in the arts and culture sector is under study in the City of Glasgow.

6.3 SUMMARY

Based on the analysis of the extensive data base developed for the Nova Scotia Arts and Culture Sector Study, four significant opportunities and four critical needs of the sector have been identified. The opportunities include the size of the arts and culture sector in the Province of Nova Scotia, the significant economic contribution the sector makes to the province, the economic dynamism of the sector and the potential of greater links with tourism. In order for these opportunities to be realized, government, in partnership with artists and the private sector, must address the following needs: more opportunities for full-time employment; the development and expansion of the arts and culture market; and increased availability of training to artists.

Critical programmes to be implemented or further studied include: disincentives to market expansion (duties on export of craft, GST/PST, amusement tax, and lack of access to business financing); the development of a provincial cultural tourism strategy; facilities needs for certain disciplines; market expansion strategies (FAM tours, "Art Fairs" and "made in Nova Scotia" labels); cultivating an "Export Culture"; human resources development and technological innovation (the development of Centres of Excellence, expanded business training and training in advanced technology, the delivery of mid-career training); and the role an arts council or other not-for-profit agency can play in quality development within the sector.

Readers are encouraged to consult the appendices of this report where they will find a rich source of data that will lead to further policies and programmes to increase the economic viability of this sector which contributes so vitally to the economy and quality of life in Nova Scotia.

APPENDICES

Photo courtesy of Charles Bishop Productions, from a television commercial production for client Irving Oil.

APPENDIX A

LORD Cultural Resources Planning & Management Inc.

Nova Scotia Arts and Culture Sector Survey

This survey is the basis for an important study on the economic potential and needs of the arts and culture sector in Nova Scotia. Your participation in this survey will greatly assist us in developing a profile of the arts/culture sector in the Province and will lead to practical recommendations to enhance the economic effectiveness of the arts sector and the well-being of artists.

We greatly appreciate your taking the time to complete this questionnaire and to mail it to the consultants in the stamped self-addressed return envelope as soon as possible. All the information collected is confidential and will be used in aggregated form only.

If you have any questions or require assistance in completing the survey, please phone (collect) Tracey Hoopey or Paula Gallagher at the telephone number below.

1. Please indicate the MAIN discipline by which you define your arts and cultural activity by ticking (✓) ONE **Main** discipline in the first column. Indicate your Secondary activities by ticking (✓) as many activities as are appropriate in the second column. Please use the third column to tick (✓) what you believe will be your Main arts and cultural activity five years from now.

DISCIPLINE/ SECTOR*	- CURRENT (1992) -		1997
	MAIN (ONE ONLY)	SECONDARY	MAIN (ONE ONLY)
a) Literary arts			
• writing	______	______	______
• editing	______	______	______
• publishing	______	______	______
• other ______	______	______	______
• ______	______	______	
b) Visual arts			
• sculpture	______	______	______
• painting	______	______	______
• drawing	______	______	______
• print-making	______	______	______
• photography	______	______	______
• other ______	______	______	______
• ______	______	______	______
c) Performing arts			
• music	______	______	______
• dance	______	______	______
• theatre	______	______	______
• other ______	______	______	______
• ______	______	______	______
d) Crafts			
• metal	______	______	______
• wood	______	______	______
• enamel	______	______	______
• fibre	______	______	______
• clay	______	______	______
• other ______	______	______	______
• ______	______	______	______

CONTINUED ON REVERSE

* *Exclusions: Festivals, radio, TV, broadcasting, newspapers, teaching art in primary or secondary schools and libraries are excluded from this question.*

DELOITTE & TOUCHE MANAGEMENT CONSULTANTS
5161 George St. Halifax, N.S. B3J 3B7 Tel: 422-8541 Fax: 423-5820

DISCIPLINE/ SECTOR*	- CURRENT (1992) -		1997
	MAIN (ONE ONLY)	SECONDARY	MAIN (ONE ONLY)
e) Media arts/ sound recording			
• film	______	______	______
• video	______	______	______
• sound recording	______	______	______
• other ______	______	______	______
• ______	______	______	______
f) Heritage			
• historical resources	______	______	______
excluding government	______	______	______
• other ______	______	______	______
• ______	______	______	______
g) Other-please list:			
______	______	______	______
______	______	______	______

2. Do you consider yourself a **professional** in your **main** arts and cultural activity.

____ Yes ____ No
____ Don't Know/ Not Sure
Comments ______________________________
____
____

3. Please indicate the type of work you do by ticking (✓) the appropriate spaces for your Main arts/culture discipline in the first column; and for your Secondary disciplines in the second column. Please use the third column to tick (✓) what type of work you believe you will be doing in five years.

TYPE OF WORK	- CURRENT (1992) -		1997
	MAIN (ONE ONLY)	SECONDARY	MAIN (ONE ONLY)
a) Create works of art, music, literature, craft etc.	______	______	______
b) Director/conductor	______	______	______
c) Performer	______	______	______
d) Technician	______	______	______
e) Administration (includes all administrative and management jobs in the sector such as gallery owner/curator, marketing, literary agent etc.)	______	______	______
f) Education, teaching (college, conservatory, university, workshops, private lessons)	______	______	______
g) Other (please list)	______	______	______
______	______	______	______
______	______	______	______

4. Have you received formal recognition for your arts/cultural activity in any of the following ways?

Yes ____ No ____
If yes, please tick (✓) those that apply to you.

__ Reviews in local publications/media
__ Reviews in regional publications/media
__ Reviews in national publications/media
__ Reviews in international publications/media
__ Acceptance in juried exhibitions
__ Awards
__ Prizes
__ Scholarships
__ Other: Please indicate ________________________________

ARTS/ CULTURAL EMPLOYMENT

5. Is your work in the arts/cultural sector year round or seasonal?

Year round ____ Seasonal ____

If seasonal, how many weeks in the past year? ________weeks.

If Seasonal, during which seasons?

Summer ___ Fall ____ Winter ___ Spring ____

6. Is your work in the arts/cultural sector full time or part time?

Full time ______ Part time ____
If part time, how many hours per week on average? ________ hours per week.

7. With respect to your arts and cultural activities, into which employment category (if any) do you fit? Please tick (✓) ONE main employment category and any secondary categories which apply.

	MAIN (ONE ONLY)	SECONDARY
a) Self-employed	____________	____________
b) Owner of a small business employing others	____________	____________
c) Member of a family business	____________	____________
d) Member of a co-operative	____________	____________
e) Free-lancer, paid by the job or on contract(s)	____________	____________
f) Salaried employee	____________	____________
g) Hourly-rated employee	____________	____________
h) Other-please indicate	____________	____________
________________________________	____________	____________
i) Not applicable	____________	____________

8. Are you an owner of a Small Business in the arts/cultural sector?

Yes ___ No ___

If yes, how many people do you employ in each of the following categories?

	Number of Employees Full Time	Part Time
Creative		
Technical		
Management		
Support		

9. Are you represented by any of the following? Tick (✓) all that apply.

__ Dealer
__ Publisher
__ Agent
__ Marketing Organization
__ Co-operative
__ Other (Please Describe) ______________________
__ None of the above

ARTS/CULTURAL INCOME/MARKETS

10. Approximately what percentage of your total personal income is derived from your art/cultural activities now? Five years ago, if applicable? And your projections for five years from now.

	Current	Five Years Ago	Five Years From Now
100%			
90 - 99%			
80 - 89%			
70 - 79%			
60 - 69%			
50 - 59%			
40 - 49%			
30 - 39%			
20 - 29%			
10 - 19%			
1 - 9%			
0%			

11. Over how many years have you earned income from your arts/cultural activities?
_______ Years.

12. What are the main ways you receive income from your artistic work. Please tick (✓) all that apply to you and circle (O) the one which is most financially rewarding.

__ Commissions
__ Royalties/ Residuals
__ Copyrights
__ Fees (e.g. speaker's fees, readings, teaching fees)
__ Sales
__ Salaries
__ Wages (hourly)
__ Grants
__ Awards
__ Tax Receipts
__ Other (Please describe) ______________
__ Not applicable

13. Please estimate the percentage of your market/audience (people who purchase, view or experience your work) who are residents of Nova Scotia, tourists and visitors to Nova Scotia and those living outside the Province who experience your work through travelling exhibitions, sales, publications and touring performances.

____ % Resident in Nova Scotia
____ % Tourists/Visitors to Nova Scotia
____ % Rest of Canada
____ % United States
____ % Other countries
(100% Total)

ARTS/CULTURAL FACILITIES AND EXPENDITURES

14. Please indicate the facilities in which you CREATE your work by ticking (✓) those you use and circling (○) the one type you use most often.

__ Own/ other residence
__ Purpose-designed studio, rehearsal hall, theatre
__ Community spaces (e.g. hall, school, library, church)
__ Vacant commercial property
__ Shared-use (e.g. with University, other institution, commercial such as a shopping mall)
__ Other ______________________________

15. Please indicate the facilities in which you PRESENT your work by ticking (✓) those you use and circling (○) the type you use most often.

__ Own/other residence
__ Purpose-designed gallery, theatre, auditorium
__ Community spaces (e.g. hall, school, library, museum, church)
__ Vacant commercial property
__ Shared-use (e.g. with University, other institution, commercial such as a shopping mall)
__ Other
__ Not applicable ______________________________

16. Please estimate your total expenditures for your arts/ cultural activities over the past year.

$__________

17. Please estimate the percentage of your arts and cultural expenditure on each of the areas below for your arts/cultural activity.

____ % Supplies (including clothing, costumes, etc.)
____ % Travel
____ % Equipment (purchase or rental)
____ % Training
____ % Staff
____ % Sales/commissions
____ % Advertising/marketing
____ % Rent for work facilities
____ % Rent for performance/exhibition facilities
____ % Other (please describe) ______________________________
____ ______________________________

100% TOTAL ARTS AND CULTURAL EXPENDITURE

Approximately what percentage of your operating expenditures (excluding staff costs) are purchases from within Nova Scotia? _________%.

NON-ARTS INCOME

18. Do you generate any of your income from non-arts sources?

Yes ______ No ______

If yes, please tick (✓) those that apply and circle (O) the most financially rewarding.

______Owner of a non-arts business
______Non-arts professional employment
______Support from family and friends
______Government employee/ civil servant
______Skilled tradesperson (carpenter, electrician etc)
______Retail or service sector work (salesperson, waiter, model etc.)
______Manufacturing sector work
______Resource sector (fishery, lumber) work
______Farmer, agricultural work
______UIC, Welfare or other government payments
______Pension/ Retirement Income
______Other (please specify) ______________________________

DEMOGRAPHIC INFORMATION

Please be assured that all information will be aggregated and will remain confidential

19. Please tick (✓) the appropriate boxes for the following general demographic/socio-economic information about yourself.

a) Your gender:
Male ___
Female ___

b) Your age:
Under 25 ___
25 - 34 ___
35 - 44 ___
45 - 54 ___
55 - 64 ___
65 or over ___

c) How many years have you resided in Nova Scotia? ____________

d) In which of Nova Scotia's 18 Counties do you now live?

__ Annapolis
__ Antigonish
__ Cape Breton
__ Colchester
__ Cumberland
__ Digby
__ Guysborough
__ Halifax
__ Hants
__ Inverness
__ Kings
__ Lunenburg
__ Pictou
__ Queens
__ Richmond
__ Shelburne
__ Victoria
__ Yarmouth

e) Highest level of formal education. Please tick (✓) the one that applies to you.

University graduate degree ___
University undergraduate degree ___
College courses or trade certificate ___
High School Diploma ___
Elementary School ___

f) Other forms of training. Please tick (✓) all that apply to you.

Workshops or courses ___
Apprenticeship/ mentor programs ___
Self-taught ___
Other (please list) ___
______________________ ___
______________________ ___

g) Your total 1991 personal income (arts and non-arts sources). Please tick (✓) one.

Under $15 000 __
$15 001 - $20 000 __
$20 001 - $25 000 __
$25 001 - $30 000 __
$30 001 - $35 000 __
$35 001 - $40 000 __
$40 001 - $45 000 __
$45 001 - $50 000 __
$50 001 - $60 000 __
$60 001 - $75 000 __
$75 001 - $90 000 __
Over $90 000 __

h) Are you covered by any of the following? Tick (✓) those that apply to you and circle (O) those in which payment is made through arts employment.

__ UIC
__ CPP
__ Workers Compensation
__ Medical Insurance
__ Disability Insurance
__ Life Insurance
__ Pension Plan/ RRSP
__ None of the above

i) To which ethnic or cultural group(s) do you belong? Tick (✓) those that apply to you.

__ French (incl. Acadian)
__ German
__ Italian
__ Ukrainian
__ Dutch (Netherlands)
__ Polish
__ N.A. Indian
__ Inuit/ Eskimo
__ English
__ Scottish
__ Irish
__ Chinese
__ Jewish
__ Black
__ Metis
__ Other: please specify ____________________

20. Are you affiliated with any professional arts organizations, unions, associations, either inside or outside Nova Scotia?

Yes ____ No ____

If yes, please tick ( ) all of those with which you are affiliated.

__ Alliance of Canadian Cinema, Television and Radio Artists (ACTRA)
__ Association of Cultural Executives
__ Atlantic Federation of Musicians
__ Atlantic Publishers Association
__ Dance Nova Scotia
__ Canadian Actors Equity Association
__ Federation of Nova Scotia Heritage
__ International Alliance of Theatrical Stage Employees (IATSE)
__ Multicultural Association of Nova Scotia
__ Music Industry Association of Nova Scotia
__ Nova Scotia Choral Federation
__ Nova Scotia Drama League
__ Nova Scotia Designer Crafts Council
__ Professional Association of Canadian Theatres
__ Visual Arts Nova Scotia
__ Writers Federation of Nova Scotia
__ Other: please specify

YOUR COMMENTS AND OPINIONS

(Please use additional pages if necessary)

21. In your experience, where is the best market potential for your work? (Tick (✓) those that apply to you).

__ Halifax area
__ Nova Scotia
__ Other Canada
__ United States
__ United Kingdom
__ Europe
__ Other. Please describe: ____________________

What help (if any) do you need to reach these markets? ____________________

22. Here are some statements related to your arts and cultural activities. Please indicate the extent to which you agree or disagree with each statement by circling the appropriate number.

	Agree Strongly		Neutral		Disagree Strongly
The opportunity to do my own artistic/ cultural work is important to me.	5	4	3	2	1
There are few opportunities for me to advance my career in arts and culture in Nova Scotia.	5	4	3	2	1
I am frequently frustrated by the need to earn additional income through non-arts employment.	5	4	3	2	1
Given the choice again I would choose to live and work in Nova Scotia.	5	4	3	2	1
My ability to earn income from arts and cultural activites would be enhanced by training.	5	4	3	2	1
I feel that I am part of a community that values arts and cultural activities.	5	4	3	2	1

23. If you believe that you would benefit from training in your arts/cultural activities, please indicate the type of training:

__ Art skills/ techniques
__ Business skills
__ Advanced technology in my discipline
__ Other. Please describe: ____________________

Is the training you want available in Nova Scotia in a format and price that meets your needs?

____

24. What is your vision for your future career in the arts/ cultural sector in Nova Scotia? What help (if any) do you need in achieving this vision? Use another sheet if necessary.

____

THANK YOU FOR PARTICIPATING IN THIS SURVEY

APPENDIX B

LORD Cultural Resources Planning & Management Inc.

SURVEY OF ARTS/CULTURE ORGANIZATIONS

Nova Scotia Arts and Culture Sector Study

This survey is essential to assist the consultants carrying out the study to develop a profile of the arts/culture sector in the province. The survey results will form the basis for recommendations and government programs to enhance the economic potential of the arts/culture sector. We greatly appreciate your taking the time to complete this questionnaire and to mail it to the consultants in the stamped, self-addressed return envelope as soon as possible.

If you have any questions or require assistance in completing the survey, please phone (collect) Tracey Hoopey or Paula Gallagher at the telephone number below.

ABOUT YOUR ORGANIZATION

1. Name of Group: ____________________

Contact Person: ____________ Phone# ____________

Mailing Address: ____________________

____

2. Which of the following four categories best describes your organization? Please tick (✓)one.

For profit company	____
Professional not-for-profit organization providing product to consumers/audiences	____
Amateur not-for-profit organization providing product to consumers/audiences	____
Service organization (not providing product directly to consumers/audiences)	____

3. Please indicate the main and any secondary activities of your organization by ticking (✓) the appropriate spaces. Please tick one main activity in 1992 and your projection for 1997 and as many secondary activities as applicable in 1992.

	- CURRENT (1992) -		1997
DISCIPLINE/ SECTOR*	MAIN (ONE ONLY)	SECONDARY	MAIN (ONE ONLY)
a) Literary arts			
• writing	____	____	
• editing	____	____	____
• publishing	____	____	____
• other ____	____	____	____
• ____	____	____	____

CONTINUED ON REVERSE

* *Exclusions: Festivals, radio, TV, broadcasting, newspapers, teaching art in primary or secondary schools and libraries are excluded from this question.*

DISCIPLINE/ SECTOR*	- CURRENT (1992) - MAIN (ONE ONLY)	SECONDARY	1997 MAIN (ONE ONLY)
b) **Visual arts**			
• sculpture	____	____	____
• painting	____	____	____
• drawing	____	____	____
• print-making	____	____	____
• photography	____	____	____
• other ____	____	____	____
• ____	____	____	____
c) **Performing arts**			
• music	____	____	____
• dance	____	____	____
• theatre	____	____	____
• other ____	____	____	____
• ____	____	____	____
d) **Crafts**			
• metal	____	____	____
• wood	____	____	____
• enamel	____	____	____
• fibre	____	____	____
• clay	____	____	____
• other ____	____	____	____
• ____	____	____	____
e) **Media arts/sound recording**			
• film	____	____	____
• video	____	____	____
• sound recording	____	____	____
• other ____	____	____	____
• ____	____	____	____
f) **Heritage**			
• historical resources excluding government	____	____	____
• other ____	____	____	____
• ____	____	____	____
g) **Other-please list:**			
____	____	____	____
____	____	____	____

4. In what year was your organization founded? __ __

5. Is your organization governed by a Board of Directors/Trustees?

Yes ___ No ___

6. What is the geographic base served by your organization?

International ______
National ______
Atlantic Region ______
Provincial ______
County ______
Community ______

7. In which of Nova Scotia's 18 counties is your organization currently headquartered?

__ Annapolis
__ Antigonish
__ Cape Breton
__ Colchester
__ Cumberland
__ Digby
__ Guysborough
__ Halifax
__ Hants
__ Inverness
__ Kings
__ Lunenburg
__ Pictou
__ Queens
__ Richmond
__ Shelburne
__ Victoria
__ Yarmouth

YOUR EMPLOYEES

8. Please indicate the number of employees your organization (wi[illegible]a Scotia) currently has? How many five years ago (if applicable) and how many do you project for five years from now.

	Current	Number of Employees Five Years Ago	Five Years From Now
• Full Time Year Round Employees	____	____	____
• Part Time Year Round Employees	____		
• Full Time Seasonal Employees	____	____	____
• Part Time Seasonal Employees	____	____	____
• Contract Employees	____	____	____

Please estimate the number of current employees (within Nova Scotia) who are in the following categories.

	Female	Number of Employees Visible Minority	Under 25 Years Old	Over 50 Years Old
• Full Time Year Round Employees	____	____	____	____
• Part Time Year Round Employees	____	____	____	____
• Full Time Seasonal Employees	____	____	____	____
• Part Time Seasonal Employees	____	____	____	____
• Contract Employees	____	____	____	____

9. Does your organization set minimum education/experience requirements for employment in the organization?

Yes ____ No ____ If yes, please tick (✓) any that apply.

	Management	Performer/ Artist	Technical Staff
High School Completion	____	____	____
Some University	____	____	____
University Graduation	____	____	____
Workshop/Courses	____	____	____
Technical Studies Specific to Discipline	____	____	____
Apprenticeship with Peer/Mentor	____	____	____
Professional Designation	____	____	____
Other, please specify	____	____	____

____

10. For full-time year-round employees, please list the title of each employee and the approximate gross salary in 1991 under the following categories where applicable. *(Use another sheet if necessary)*

Management	**Gross 1991 Salary**
______________________	$ __________
______________________	$ __________
______________________	$ __________
Performers/Artists	**Gross 1991 Salary**
______________________	$ __________
______________________	$ __________
______________________	$ __________
Technical Staff	**Gross 1991 Salary**
______________________	$ __________
______________________	$ __________
______________________	$ __________

11. Do you provide training opportunities for your staff?

Yes ____ No ___ If no, why not: ______________________________

____

____

If yes, is the training:

Attendance at courses/workshops ____
Attendance at conferences ____
University courses ____
Other, please specify ____
____

If yes, does all training take place within Nova Scotia?

Yes ___ No ___ If no, why not: ______________________________

____

____

12. Are you or your employees members of a union, organization or professional association?

Yes ___ No ___

If yes, please tick (✓) all of those with which they are affiliated.

__ Alliance of Canadian Cinema, Television and Radio Artists (ACTRA)
__ Association of Cultural Executives
__ Atlantic Federation of Musicians
__ Atlantic Publishers Association
__ Dance Nova Scotia
__ Canadian Actors Equity Association
__ Federation of Nova Scotia Heritage
__ International Alliance of Theatrical Stage Employees (IATSE)
__ Multicultural Association of Nova Scotia
__ Music Industry Association of Nova Scotia
__ Nova Scotia Choral Federation
__ Nova Scotia Drama League
__ Nova Scotia Designer Crafts Council
__ Professional Association of Canadian Theatres
__ Visual Arts Nova Scotia
__ Writers' Federation of Nova Scotia
__ Other: please specify ______________________________

____

13. Which of the following benefits do you provide for your employees? Please tick (✓) all that apply.

Canada Pension Plan ____
Other Pension Plan ____
Unemployment Insurance ____
Workers Compensation ____
Medical Insurance ____
Disability Insurance ____
Liability Insurance ____
Life Insurance ____
RRSP ____
Other: please specify ____________________
____

YOUR VOLUNTEERS

14. Does your organization operate with volunteers? If no, please go to question 17.

Yes ____ No ____

If yes,approximately how many volunteers do you currently have, compared to five years ago as well as your projection for five years from now under the following categories.

	Number of Volunteers		
	Current	Five Years Ago	Projected Five Years from Now
Board of Directors	____	____	____
Artists/Performers/ Participants	____	____	____
Support Volunteers (e.g. office admin.)	____	____	____
Other, please specify	____	____	____
____	____	____	____
____	____	____	____

15. Do you provide training opportunities for your volunteers?

Yes ____ No ____

If yes, is the training:

In house sessions ____
Attendance at courses/workshops ____
Attendance at conferences ____
University courses ____
Other, please specify: ____
____
____

16. Do you offer benefits such as special dinners, trips or other forms of appreciation to your volunteers?

Yes ____ No ____

If yes, please describe: ____________________
____
____

YOUR MEMBERS

17. The term *"member"* has different meanings for various arts organizations. For a choir, *"member"* refers to a participant. For an art gallery or museum a *"member"* means an individual, family or corporate supporter while a *"member"* of an arts service organization likely refers to a dues-paying individual.

In the context of how membership applies to your organization, please list the current number of members, as well as the number of members five years ago and your projections for five years from now.

Number of Members

Current ____ **Five Years Ago** ____ **Five Years From Now** ____

YOUR MARKETS

18. Does your organization sponsor or take part in performances/exhibitions/shows for the general public?

Yes ____ No ____ If no, go to question 20.

If yes, during which seasons?

Summer ____
Fall ____
Winter ____
Spring ____

Please estimate what percentage of your audience/market are currently residents of Nova Scotia, visitors to Nova Scotia or are reached out of the province. How does this compare to five years ago (if applicable) and what is your projection for five years from now?

	Current	**Five Years Ago**	**Five Years From Now**
Nova Scotia Residents	____ %	____ %	____ %
Visitors to Nova Scotia (Tourists, Business Visitors)	____ %	____ %	____ %
Outside Nova Scotia (Reached on tours)	____ %	____ %	____ %
TOTAL AUDIENCE	100 %	100 %	100 %

19. Five years from now do you believe that your total audience/market will increase, decline or remain the same?

Increase ____ Decline ____ Remain Same ____

If increase, please estimate by what percentage ____ %
If decline, please estimate by what percentage ____ %

20. Does your organization sell products? If no, go to question 22.

Yes ____ No ____ If yes, please describe ______________________________

If yes, approximately what percentage of sales are currently within the province, elsewhere in Canada, the United States and to other international markets? What was it five years ago if applicable?

	Current	Five Years Ago	Five Years From Now
Nova Scotia	________	________	________
Other Canada	________	________	________
United States	________	________	________
Other Countries	________	________	________
TOTAL PRODUCT SALES	100%	100%	100%

21. Five years from now, do you believe that your total sales will increase, decline or remain the same?

Increase ____ Decline ____ Remain Same ____

If increase, please estimate by what percentage ____%
If decline, please estimate by what percentage ____%

YOUR FACILITIES

22. Please indicate the facilities used by your organization for office, meeting, production and sales purposes, where applicable. Please tick (✓) all that apply.

	Office	Meeting	Production/ Performance	Sales
Own/other residence	________	________	________	________
Own commercial space	________	________	________	________
Rented commercial space	________	________	________	________
Community spaces (e.g. hall, school, library, church)	________	________	________	________
Other: please specify	________	________	________	________

____

YOUR FINANCES

23. What is your current annual operating budget? $ ________

24. Please categorize your current operating expenditures (rounded figures are fine) as follows:

Salaries, wages,benefits	$ ________
Supplies	$ ________
Equipment	$ ________
Sales/commissions	$ ________
Rent	$ ________
Travel	$ ________
Advertising/marketing	$ ________
Training	$ ________
Other: please describe	$ ________ ______________________________

Approximately what percentage of your operating expenditures (excluding staff costs) are purchased from within Nova Scotia?
__________%

25. Please categorize your current operating revenues (rounded figures are fine) as follows:

Sales of Product/Services	$	
Private Sector Fundraising/Donations	$	
Other Self-Generated Revenue	$	
Municipal/County Grants	$	
Provincial Grants	$	
Federal Grants	$	
Total	$	

YOUR COMMENTS AND OPINIONS

26. What is your vision for the future of your organization and what help (if any) does your organization need in achieving this vision for the future? You may elaborate on another page if necessary.

27. Please describe both the opportunities and the constraints to growth in your arts/culture sector as you see them.

Opportunities:

Constraints:

28. What assistance (if any) is required by the arts/culture sector to maximize opportunities for growth or to address current constraints?

THANK YOU FOR PARTICIPATING IN THIS SURVEY

APPENDIX C

APPENDIX C

ORGANIZATIONS WHICH PROVIDED MEMBERSHIP/MAILING LISTS

- Atlantic Filmakers' Cooperative (AFCOOP)
- Alliance of Canadian Cinema, Television, Radio Artists (ACTRA)
- Atlantic Craft Trade Show (ACTS)
- Atlantic Federation of Musicians, Local 571
- Buyers Guide '92
- Canadian Actor's Equity Association
- Cape Breton Musicians' Association, Local 355
- Cape Breton School of Crafts
- Conseil Culturel Acadien de la Nouvelle Ecosse
- Cultural Federations of Nova Scotia (CFNS)
- Dance Nova Scotia
- Department of Tourism and Culture, Cultural Affairs Division
- Directory of Nova Scotia Galleries, Public and Private
- East Coast Music Association
- Federation of Nova Scotian Heritage
- International Association of Theatrical Stage Employees (IATSE)
- Multicultural Association of Nova Scotia
- Music Industry Association of Nova Scotia
- Nova Scotia Booksellers' Association
- Nova Scotia Centre for Arts and Design (NSCAD)
- Nova Scotia Choral Federation
- Nova Scotia Designer Crafts Council
- Nova Scotia Drama League
- Nova Scotia Print Makers' Association
- Performing Arts Sponsors Organization of Nova Scotia (PASONS)
- Visual Arts Nova Scotia
- Writers' Federation of Nova Scotia

APPENDIX D

APPENDIX D

INDIVIDUAL SURVEY RESULTS, BY DISCIPLINE

	TOTAL N=670	LITERARY ARTS N=142	VISUAL ARTS N=162	PERFORMING ARTS N=241	CRAFTS N=55	MEDIA ARTS/SOUND RECORDING N=22
(#1) MAIN ACTIVITIES WITHIN DISCIPLINE - 1992 (%)		Writing 94.4 Editing 2.8 Publishing 0.7 Other 2.1 100.0	Sculpture 5.6 Painting 71.0 Drawing 3.7 Print-making 6.8 Photography 4.9 Other 8.0 100.0	Music 68.5 Dance 7.5 Theatre 20.7 Other 3.3 100.0	Metal 5.5 Wood 20.0 Enamel - Fibre 43.6 Clay 16.4 Other 14.5 100.0	Film 45.5 Video 22.7 Sound Recording 27.3 Other 4.5 100.0
(#1) SECONDARY ACTIVITIES (%) ≠100						
Literary Arts						
. Writing	20.7	10.2	19.3	25.9	25.0	33.3
. Editing	16.3	49.0	4.1	7.0	12.5	5.6
. Publishing	11.0	25.5	4.1	7.0	6.3	11.1
. Other	4.8	15.3	1.4	3.2	-	-
Visual Arts						
. Sculpture	8.9	4.1	15.2	1.9	21.9	5.6
. Painting	12.6	16.3	13.1	5.7	25.0	5.6
. Drawing	25.0	9.2	57.9	6.3	25.0	-
. Print-making	10.1	4.1	21.4	4.4	9.4	5.6
. Photography	14.7	16.3	17.2	10.8	9.4	11.1
. Other	8.7	8.2	15.9	4.4	3.1	-
Performing Arts						
. Music	14.3	14.3	9.7	19.0	12.5	16.7
. Dance	9.1	5.1	3.4	15.2	9.4	-
. Theatre	17.1	18.4	6.9	25.9	12.5	27.8
. Other	7.2	5.1	0.7	17.1	3.1	5.6
Crafts						
. Metal	3.5	1.0	3.4	2.5	12.5	5.6
. Wood	7.6	4.1	7.6	10.1	9.4	-
. Enamel	1.0	-	2.1	1.3	-	-
. Fibre	3.9	3.1	5.5	3.2	3.1	-
. Clay	3.1	2.0	5.5	1.3	3.1	5.6
. Other	5.0	3.1	3.4	5.1	18.8	-
Media Arts/Sound Recording						
. Film	9.7	10.2	0.7	16.5	6.3	27.8
. Video	11.0	9.2	4.8	14.6	9.4	33.3
. Sound Recording	9.9	4.1	2.1	22.8	3.1	11.1
. Other	1.7	1.0	0.7	3.2	-	5.6
Heritage						
. Historical Resources	3.7	5.1	0.7	2.5	3.1	-
. Other	1.7	5.1	3.4	-	-	-

	TOTAL N=670	LITERARY ARTS N=142	VISUAL ARTS N=162	PERFORMING ARTS N=241	CRAFTS N=55	MEDIA ARTS/SOUND RECORDING N=22
Other						
-	2.3	1.0	2.8	3.2	-	-
(#1) MAIN DISCIPLINE IN 5 YEARS (%)						
Literary Arts						
- Writing	23.9	93.2	4.8	4.1	-	-
- Editing	0.2	0.9	-	-	-	-
- Publishing	0.2	0.9	-	-	-	-
- Other	0.6	2.6	-	0.5	-	-
Visual Arts						
- Sculpture	1.3	-	4.8	-	-	-
- Painting	18.5	-	65.5	-	2.6	-
- Drawing	0.6	-	2.1	-	-	-
- Print-making	2.1	-	6.9	0.5	-	-
- Photography	1.1	-	4.1	-	-	-
- Other	2.7		8.3	-	2.6	-
Performing Arts						
- Music	22.9	0.9	0.7	59.7	-	-
- Dance	3.0	-	-	8.2	-	-
- Theatre	7.6	-	0.7	19.4	-	-
- Other	1.3	-	-	3.6	-	-
Crafts						
- Metal	0.2	-	-	-	2.6	-
- Wood	1.7	-	-	-	23.7	-
- Enamel	-	-	-	-	-	-
- Fibre	2.9	-	0.7	-	36.8	-
- Clay	1.9	-	0.7	-	21.1	5.3
- Other	0.8	-	-	-	10.5	-
Media Arts/Sound Rec.						
- Film	2.3	0.9	0.7	1.0	-	42.1
- Video	1.1	-	-	0.5	-	21.1
- Sound Recording	1.7	-	-	1.5	-	26.3
- Other	0.2	-	-	-	-	5.3
Heritage						
- Historical Resources	0.4	-	-	-	-	-
- Other	-	-	-	-	-	-
Other	0.6	-	-	1.0	-	-
	100.0	100.0	100.0	100.0	100.0	100.0
(#2) PROFESSIONAL? (%)						
- Yes	73.0	63.0	79.0	73.0	75.0	95.0
- No	20.0	25.0	12.0	21.0	22.0	5.0
- Don't Know	7.0	12.0	9.0	6.0	3.0	-
	100.0	100.0	100.0	100.0	100.0	100.0

	TOTAL N=670	LITERARY ARTS N=142	VISUAL ARTS N=162	PERFORMING ARTS N=241	CRAFTS N=55	MEDIA ARTS/SOUND RECORDING N=22
(#3) MAIN TYPE OF WORK - 1992 (%)						
	54.0	75.0	90.0	16.0	82.0	25.0
Create	3.0	0.8	0.6	5.3	2.0	8.3
Director	23.0	3.1	-	58.0	-	8.3
Performer	2.0	-	-	2.2	-	41.7
Technician	4.0	3.8	3.2	3.6	4.0	8.3
Administration	9.0	8.5	4.5	13.0	6.0	-
Education	5.0	9.2	1.2	1.3	6.0	8.3
Other						
	100.0	100.0	100.0	100.0	100.0	100.0
(#3) SECONDARY TYPE OF WORK - 1992 (%) ≠100						
Create	25.9	20.2	22.0	30.8	23.7	19.2
Director	8.5	4.3	1.6	12.2	-	23.1
Performer	12.2	13.8	4.7	15.9	-	19.2
Technician	5.1	2.2	4.7	5.0	5.3	15.4
Administration	13.0	10.6	18.9	10.3	13.2	11.5
Education	29.9	39.4	44.1	20.9	52.6	11.5
Other	5.5	9.6	3.9	5.0	5.3	-
(#3) MAIN TYPE OF WORK IN 5 YEARS (%)						
Create	59.0	79.0	87.0	25.0	86.0	16.0
Director	3.0	-	0.8	6.2	2.4	5.3
Performer	18.0	1.0	-	47.0	-	21.0
Technician	2.0	1.0	-	2.8	-	26.0
Administration	5.0	1.0	5.6	2.8	2.4	26.0
Education	9.0	11.0	5.6	13.0	4.8	-
Other	4.0	7.0	0.8	2.7	4.8	5.3
	100.0	100.0	100.0	100.0	100.0	100.0
(#4) RECEIVED RECOGNITION?(%)						
Yes						
No	86.0	84.0	89.0	87.0	78.0	82.0
	14.0	16.0	11.0	13.0	22.0	18.0
	100.0	100.0	100.0	100.0	100.0	100.0
(#4) RECOGNITION RECEIVED (%) ≠100						
Reviews in Local Publications	81.1	69.5	80.6	92.8	61.4	72.2
Reviews in Regional Publications	59.0	57.6	60.4	61.2	40.9	61.1
Reviews in National Publications	37.0	39.8	24.3	45.5	20.5	50.0
Reviews in International Publications	17.3	22.9	13.2	17.7	9.1	27.8
Juried Exhibitions	38.0	14.4	76.4	19.1	63.6	22.2
Awards	45.0	52.5	47.9	40.7	29.5	55.6
Prizes	19.1	25.4	22.2	12.9	25.0	16.7
Scholarships	10.0	6.8	9.0	15.3	6.8	5.6
Other	8.1	11.9	8.3	6.7	4.5	5.6

	TOTAL N=670	LITERARY ARTS N=142	VISUAL ARTS N=162	PERFORMING ARTS N=241	CRAFTS N=55	MEDIA ARTS/SOUND RECORDING N=22
(#5) YEAR ROUND EMPLOYMENT (%)	87.0	93.0	91.0	84.0	82.0	81.0
(#5) SEASONAL EMPLOYMENT (%)	13.0	7.0	9.0	16.0	18.0	19.0
	100.0	100.0	100.0	100.0	100.0	100.0
(#5) IF SEASONAL - AVERAGE WEEKS PER YEAR (No.)	25.1	14.7	24.1	28.5	16.2	25.4
(#5) IF SEASONAL - WHICH SEASONS? (%) ≠100						
. Summer	40.2	62.5	40.0	30.0	34.7	32.9
. Fall	65.9	25.0	46.7	85.0	72.0	74.0
. Winter	76.8	62.5	86.7	82.5	84.0	86.3
. Spring	61.0	37.5	33.3	77.5	66.7	68.5
(#6) FULL TIME EMPLOYMENT (%)	48.0	36.0	55.0	50.0	36.0	62.0
(#6) PART TIME EMPLOYMENT (%)	52.0	64.0	44.0	50.0	64.0	38.0
	100.0	100.0	100.0	100.0	100.0	100.0
(#6) IF PART TIME - AVERAGE HOURS PER WEEK (No.)	16.1	16.8	17.6	13.3	19.7	27.5
(#7) EMPLOYMENT CATEGORY - MAIN (%)						
. Self-employed/free lance	68.3	74.0	82.7	63.0	69.1	41.0
. Owner of small business	3.3	2.9	1.3	3.5	5.8	9.1
. Member of family business	1.3	2.2	0.6	0.4	3.8	-
. Member of a co-op	0.9	0.7	1.3	-	3.8	-
. Salaried employee	11.4	3.6	5.8	19.0	1.9	32.0
. Hourly rated employee	2.3	0.7	1.3	2.2	3.8	18.0
. Other	3.6	4.4	1.9	3.9	1.9	-
. N/A	8.8	11.0	5.2	8.3	12.0	-
	100.0	100.0	100.0	100.0	100.0	100.0
(#7) EMPLOYMENT CATEGORY - SECONDARY (%) ≠100						
. Self-employed/free lance	81.8	74.6	71.6	96.1	55.6	100.0
. Owner of small business	9.7	8.5	10.8	8.7	18.5	7.7
. Member of family business	2.5	3.4	4.1	0.8	3.7	7.7
. Member of a co-op	6.9	5.1	10.8	4.7	3.7	23.1
. Salaried employee	8.5	8.5	13.5	7.1	3.7	-
. Hourly rated employee	12.9	8.5	16.2	15.0	14.8	7.7
. Other	5.7	5.1	6.8	3.9	11.1	-
. N/A	7.2	8.5	6.8	7.1	11.1	-

	TOTAL N=670	LITERARY ARTS N=142	VISUAL ARTS N=162	PERFORMING ARTS N=241	CRAFTS N=55	MEDIA ARTS/SOUND RECORDING N=22
(#8) OWNER OF A SMALL ARTS AND CULTURE BUSINESS? (%)						
. Yes	18.0	14.0	22.0	12.0	40.0	32.0
. No	82.0	86.0	78.0	88.0	60.0	68.0
	100.0	100.0	100.0	100.0	100.0	100.0
(#9) % =100 REPRESENTED BY:						
. Dealer	11.6	0.7	36.8	0.4	7.3	-
. Publisher	10.7	24.8	3.7	7.0	1.8	-
. Agent	11.8	7.1	3.1	20.6	3.6	12.5
. Marketing Organization	2.6	2.8	1.2	1.8	5.5	4.2
. Co-op	4.7	2.1	4.9	3.1	9.1	16.7
. Other	13.3	7.8	9.8	13.6	9.1	29.2
. None of the Above	55.8	54.6	40.5	53.1	63.6	37.5
(#10) ARTS AND CULTURE INCOME - 1992 (%)						
. 100%	29.7	15.0	26.6	37.7	24.0	59.1
. 90-99%	2.5	0.7	3.9	2.6	4.0	-
. 80-89%	2.8	1.4	2.6	3.5	2.0	-
. 70-79%	2.5	3.6	2.0	3.5	-	-
. 60-69%	2.5	2.1	2.0	2.6	-	9.1
. 50-59%	4.1	5.0	5.8	2.6	4.0	9.1
. 40-49%	1.9	1.4	2.6	2.2	2.0	-
. 30-39%	2.5	1.4	3.9	1.7	2.0	9.1
. 20-29%	8.3	10.0	10.4	7.4	6.0	4.6
. 10-19%	7.2	7.9	10.4	5.2	12.0	-
. 1-9%	23.8	32.1	25.3	18.2	30.0	9.1
. 0%	12.2	19.3	4.6	13.0	14.0	-
	100.0	100.0	100.0	100.0	100.0	100.0
(#10) ARTS AND CULTURE INCOME - 5 YEARS AGO (%)						
. 100%	26.8	15.1	24.1	36.2	19.6	42.9
. 90-99%	3.1	2.4	2.1	4.8	4.4	-
. 80-89%	2.4	0.8	2.8	3.3	-	4.8
. 70-79%	1.7	0.8	1.4	2.9	2.2	-
. 60-69%	2.6	0.8	2.8	3.3	-	4.8
. 50-59%	3.4	4.0	6.2	2.4	2.2	-
. 40-49%	1.2	0.8	1.4	1.4	2.2	-
. 30-39%	3.8	5.6	2.1	3.3	4.4	-
. 20-29%	5.0	4.8	4.1	5.2	8.7	4.8
. 10-19%	9.4	10.3	15.2	6.7	4.4	4.8
. 1-9%	19.5	20.6	23.4	15.7	26.1	19.0
. 0%	21.0	34.1	14.5	14.8	26.1	19.0
	100.0	100.0	100.0	100.0	100.0	100.0

	TOTAL N=670	LITERARY ARTS N=142	VISUAL ARTS N=162	PERFORMING ARTS N=241	CRAFTS N=55	MEDIA ARTS/SOUND RECORDING N=22
(#10) ARTS AND CULTURE INCOME - 5 YEARS FROM NOW (%)						
. 100%	36.5	23.0	36.0	42.5	26.1	60.0
. 90-99%	5.3	3.5	6.6	5.7	6.7	5.0
. 80-89%	3.9	3.5	3.7	3.8	4.4	5.0
. 70-79%	4.1	3.5	5.9	2.4	6.7	10.0
. 60-69%	2.5	1.8	3.7	2.8	-	5.0
. 50-59%	5.5	8.9	8.8	1.4	6.7	10.0
. 40-49%	2.7	3.5	2.2	2.8	2.2	-
. 30-39%	3.4	4.4	5.9	1.9	2.2	-
. 20-29%	8.2	9.7	8.8	8.0	8.9	-
. 10-19%	7.8	11.5	5.9	7.1	11.1	5.0
. 1-9%	12.1	18.6	11.0	10.8	13.3	-
. 0%	7.8	7.1	1.5	10.8	11.1	-
	100.0	100.0	100.0	100.0	100.0	100.0
(#11) AVERAGE YEARS EARNING ARTS AND CULTURE INCOME (No.)	13.5	11.3	13.6	15.4	12.7	13.6
(#12) WAYS ARTS AND CULTURE INCOME IS RECEIVED (%) ≠100						
. Commissions	27.3	19.7	55.1	13.2	37.7	18.2
. Royalties	20.9	40.9	3.8	25.2	3.8	32.6
. Copyrights	7.1	19.7	4.4	4.3	1.9	-
. Fees	41.1	48.9	31.6	51.3	32.1	22.7
. Sales	39.2	28.5	86.7	6.0	71.7	22.7
. Salaries	21.5	12.4	11.4	37.6	7.5	22.7
. Wages	19.2	10.2	12.7	27.4	15.1	45.5
. Grants	14.7	11.7	14.6	17.5	9.4	13.6
. Awards	8.6	11.7	10.7	7.3	1.9	18.2
. Tax Receipts	5.5	6.6	10.1	2.1	3.8	9.1
. Other	11.6	13.1	6.9	15.4	7.5	9.1
. N/A	7.2	9.5	3.8	7.7	9.4	-
(#12) MOST FINANCIALLY REWARDING WAY (%)						
. Commissions	9.8	10.3	19.6	2.6	17.6	-
. Royalties	6.7	21.8	-	7.0	-	-
. Copyrights	-	-	-	-	-	-
. Fees	16.3	24.4	4.7	25.5	8.8	6.3
. Sales	26.3	12.8	58.9	1.9	55.9	12.5
. Salaries	17.7	7.7	7.5	31.2	5.9	25.0
. Wages	11.7	7.7	2.8	15.3	8.8	50.0
. Grants	1.0	1.3	2.8	-	-	-
. Awards	1.7	3.9	0.9	1.9	-	-
. Tax Receipts	0.2	-	-	0.6	2.9	-
. Other	7.2	7.7	2.8	11.5	-	6.3
. N/A	1.2	2.3	-	2.6	-	-
	100.0	100.0	100.0	100.0	100.0	100.0

	TOTAL N=670	LITERARY ARTS N=142	VISUAL ARTS N=162	PERFORMING ARTS N=241	CRAFTS N=55	MEDIA ARTS/SOUND RECORDING N=22
(#13) MARKET - %						
N.S. Residents	66.8	57.6	63.2	75.1	68.2	66.3
N.S. Tourists/Visitors	12.4	7.8	16.4	10.0	18.2	15.5
Canada	14.1	22.5	14.0	10.3	8.1	14.6
United States	4.5	7.5	4.2	3.1	4.7	1.8
Other	2.2	4.5	2.1	1.5	0.8	1.3
	100.0	100.0	100.0	100.0	100.0	100.0
(#14) WHERE WORK IS CREATED (%) ≠100						
Own residence	82.0	94.9	86.9	72.7	87.3	57.1
Purpose-designed facility	36.0	13.0	32.5	55.5	20.0	66.7
Community spaces	27.0	14.5	17.5	46.3	20.0	9.5
Vacant commercial	2.0	0.7	3.8	4.0	1.8	4.8
Shared use	10.0	9.4	10.0	12.8	1.8	9.5
Other	8.0	9.4	7.5	5.3	7.3	14.3
(#14) WHERE WORK IS CREATED MOST OFTEN (%)						
Own residence	67.0	90.0	73.0	48.0	81.0	68.0
Purpose-designed facility	19.0	3.1	20.0	29.0	8.3	21.0
Community spaces	6.1	1.5	0.7	15.0	4.2	4.8
Vacant commercial	1.0	-	2.1	1.0	-	0.7
Shared use	2.4	0.8	1.4	4.5	2.1	2.0
Other	4.3	4.6	2.8	3.0	4.2	3.7
	100.0	100.0	100.0	100.0	100.0	100.0
(#15) WHERE WORK IS PRESENTED (%) ≠100						
Own/other residence	31.0	22.7	54.4	15.7	59.3	14.3
Purpose-designed facility	54.0	19.7	78.8	62.0	44.4	57.1
Community spaces	46.0	31.1	43.1	61.6	37.0	23.8
Vacant commercial	2.7	-	3.8	3.1	5.6	-
Shared use	16.0	12.1	14.4	21.0	14.8	9.5
Other	19.0	21.2	8.8	21.8	22.2	47.6
N/A	12.0	39.4	1.3	7.4	1.9	9.5
(#15) WHERE PRESENTED MOST OFTEN (%)						
Own/other residence	16.0	17.0	17.0	8.3	43.0	15.0
Purpose-designed facility	37.0	7.5	65.0	39.0	17.0	41.0
Community spaces	19.0	25.0	4.6	29.0	13.0	17.0
Vacant commercial	1.0	-	3.1	0.5	-	1.0
Shared use	4.7	3.2	2.3	4.7	10.2	4.8
Other	15.0	18.0	6.9	15.0	14.3	15.0
N/A	8.2	29.0	0.8	3.6	2.0	6.5
	100.0	100.0	100.0	100.0	100.0	100.0

	TOTAL N=670	LITERARY ARTS N=142	VISUAL ARTS N=162	PERFORMING ARTS N=241	CRAFTS N=55	MEDIA ARTS/SOUND RECORDING N=22
(#16) AVERAGE ARTS AND CULTURE EXPENDITURE ($)	$12,555.00	$5,204.00	$6,669.00	$18,390.00	$5,767.00	$16,508.00
(#17) EXPENDITURES (%)						
. **Supplies**	36.4	41.8	49.3	22.9	50.6	27.3
. **Travel**	14.3	15.3	9.5	18.9	9.3	8.7
. **Equipment**	19.2	17.0	8.6	28.1	11.0	43.9
. **Training**	5.4	4.6	4.4	5.7	5.8	0.6
. **Staff**	2.9	2.0	1.1	4.2	3.3	11.4
. **Sales/Commissions**	2.7	0.6	6.7	1.4	3.9	-
. **Advertising/Marketing**	3.5	3.6	3.3	3.7	1.9	4.4
. **Rent - Work**	3.6	3.3	4.6	3.1	4.3	2.0
. **Rent - Perform**	1.4	0.2	2.1	1.4	2.7	-
. **Other**	10.5	11.7	10.2	10.5	7.1	1.7
	100.0	100.0	100.0	100.0	100.0	100.0
(#17) % EXPENDITURES WITHIN NOVA SCOTIA	83.4	87.2	78.4	86.5	77.2	76.9
(#18) GENERATE NON ARTS AND CULTURE INCOME? (%)						
. **Yes**	73.0	87.0	77.0	64.0	69.0	69.0
. **No**	26.0	12.0	22.0	35.0	31.0	31.0
	100.0	100.0	100.0	100.0	100.0	100.0
(#18) IF YES, HOW? (%) ≠100						
. **Owner of non-arts business**	7.0	5.7	8.9	6.0	7.8	-
. **Non-arts professional employment**	19.6	21.8	16.2	21.9	17.6	6.7
. **Support from family**	13.2	10.9	19.0	9.3	15.7	20.0
. **Government employee**	9.7	13.8	6.1	10.2	5.9	13.3
. **Skilled trade**	5.1	1.1	2.8	9.8	7.8	6.7
. **Retail/service**	5.1	5.2	3.9	6.5	1.9	6.7
. **Manufacturing**	1.2	1.1	2.2	0.9	-	-
. **Resource Sector**	1.0	1.1	1.7	0.9	-	-
. **Farmer**	1.5	2.3	0.6	1.9	-	-
. **UIC**	10.4	7.5	7.8	15.8	5.9	26.7
. **Pension Plan**	13.7	17.2	14.5	6.0	23.5	13.3
. **Other**	12.5	12.1	16.2	10.7	11.8	6.7

	TOTAL N=670	LITERARY ARTS N=142	VISUAL ARTS N=162	PERFORMING ARTS N=241	CRAFTS N=55	MEDIA ARTS/SOUND RECORDING N=22
(#18) MOST FINANCIALLY REWARDING (%)						
. Owner of non-arts business	6.7	5.2	9.6	4.9	4.6	-
. Non-arts professional employment	24.4	23.4	20.5	27.5	27.3	-
. Support from family	7.0	3.9	12.3	5.9	9.1	25.0
. Government employee	13.0	16.9	11.0	12.7	9.1	25.0
. Skilled trade	4.4	1.3	2.7	7.8	9.1	-
. Retail/service	5.4	6.5	5.5	6.9	-	-
. Manufacturing	0.7	-	2.7	-	-	-
. Resource Sector	1.0	-	1.4	2.0	-	-
. Farmer	1.7	3.9	-	2.0	-	-
. UIC	8.0	5.2	5.5	12.7	-	50.0
. Pension Plan	16.4	22.1	13.7	8.8	27.3	-
. Other	11.4	11.7	15.1	8.8	13.6	-
	100.0	100.0	100.0	100.0	100.0	100.0
(#19) GENDER (%)						
. Male	50.0	49.0	34.0	62.0	27.0	86.0
. Female	50.0	51.0	66.0	38.0	73.0	14.0
	100.0	100.0	100.0	100.0	100.0	100.0
(#19) AGE (%)						
. < 25 years	4.7	5.6	1.9	6.3	1.9	4.8
. 25-34 years	17.0	11.0	12.0	23.0	11.0	43.0
. 35-44 years	34.0	31.0	34.0	40.0	26.0	24.0
. 45-54 years	23.0	25.0	29.0	16.0	28.0	24.0
. 55-64 years	12.0	13.0	13.0	11.0	19.0	-
. 65+ years	9.4	14.0	11.0	3.8	15.0	4.8
	100.0	100.0	100.0	100.0	100.0	100.0
(#19) AVERAGE YEARS IN NOVA SCOTIA (No.)	26.9	27.0	26.1	25.8	32.3	25.7

	TOTAL N=670	LITERARY ARTS N=142	VISUAL ARTS N=162	PERFORMING ARTS N=241	CRAFTS N=55	MEDIA ARTS/SOUND RECORDING N=22
(#19) COUNTY OF RESIDENCE (%)						
. Annapolis	3.5	6.3	5.1	1.3	3.8	-
. Antigonish	2.3	2.8	3.8	1.3	3.8	-
. Cape Breton	7.5	2.8	4.4	10.6	15.1	4.8
. Colchester	3.2	4.3	5.7	2.1	1.9	-
. Cumberland	0.6	-	1.9	0.4	-	-
. Digby	1.7	1.4	1.9	1.3	3.8	-
. Guysborough	0.3	-	-	0.9	-	-
. Halifax	57.4	57.4	48.1	63.1	39.6	85.7
. Hants	1.8	1.4	3.2	1.7	-	-
. Inverness	3.1	2.8	1.3	3.8	5.7	-
. Kings	5.2	8.5	6.3	4.7	-	-
. Lunenburg	4.9	3.6	7.0	3.4	11.3	4.8
. Pictou	2.1	4.3	2.5	1.3	1.9	-
. Queens	0.8	-	-	1.7	-	-
. Richmond	0.8	0.7	0.6	0.4	3.8	-
. Shelburne	0.6	0.7	1.3	-	1.9	-
. Victoria	1.5	1.4	1.3	1.3	3.8	4.8
. Yarmouth	2.6	1.4	5.7	0.9	3.8	-
	100.0	100.0	100.0	100.0	100.0	100.0
(#19) FORMAL EDUCATION (%)						
. University graduate	32.0	45.0	35.0	28.0	16.0	18.0
. University undergraduate	31.0	28.0	29.0	31.0	35.0	27.0
. College	21.0	16.0	25.0	20.0	27.0	45.0
. High School	14.0	7.8	9.4	20.0	16.0	9.1
. Elementary School	2.3	3.5	1.9	1.7	5.5	-
	100.0	100.0	100.0	100.0	100.0	100.0
(#19) OTHER FORMS OF TRAINING ≠100						
. Workshops	79.0	71.5	82.0	79.0	85.2	90.5
. Apprenticeship	25.0	17.1	16.0	32.6	31.5	52.4
. Self-taught	72.0	82.9	74.7	66.5	79.6	71.4
. Other	17.0	10.6	21.3	19.2	11.1	-
(#19) 1991 TOTAL INCOME (%)						
. < $15,000	31.7	31.4	40.8	22.4	58.1	9.1
. $15,001 - $20,000	12.4	14.6	11.6	13.6	9.8	22.7
. $20,001 - $25,000	10.2	10.2	11.6	11.4	2.0	9.1
. $25,001 - $30,000	7.7	4.4	3.4	11.8	9.8	4.6
. $30,001 - $35,000	7.6	7.3	7.5	7.9	7.8	9.1
. $35,001 - $40,000	7.1	4.4	6.8	9.2	2.0	18.2
. $40,001 - $45,000	4.4	2.3	4.1	5.3	2.0	9.1
. $45,001 - $50,000	5.0	4.4	4.8	4.8	7.8	-
. $50,001 - $60,000	6.0	7.3	3.4	6.1	-	13.6
. $60,001 - $75,000	4.4	7.3	3.4	4.4	-	4.6
. $75,001 - $90,000	1.9	3.7	1.4	0.9	-	-
. > $90,000	1.6	2.2	1.4	2.2	-	-
	100.0	100.0	100.0	100.0	100.0	100.0

	TOTAL N=670	LITERARY ARTS N=142	VISUAL ARTS N=162	PERFORMING ARTS N=241	CRAFTS N=55	MEDIA ARTS/SOUND RECORDING N=22
(#19) % COVERED BY: (≠100)						
. UIC	40.1	38.7	27.2	42.7	23.6	68.2
. CPP	47.7	45.1	34.6	48.1	38.2	59.1
. Workers Compensation	18.2	17.6	16.7	17.4	5.5	27.3
. Medical Insurance	48.2	50.7	37.7	43.2	29.1	59.1
. Disability Insurance	31.3	31.0	25.3	30.3	18.2	50.0
. Life Insurance	34.8	32.4	24.1	35.7	29.1	36.4
. Pension Plan/RRSP	32.6	30.3	24.1	34.0	32.7	31.8
. None	20.4	16.9	23.5	16.6	30.9	4.5
(#19) % COVERED THROUGH ARTS	14.0	3.8	1.2	26.1	11.7	27.3
(#19) ETHNIC/CULTURAL GROUP (%) ≠100						
. French	16.5	15.8	14.6	14.8	21.6	20.0
. German	8.4	7.9	7.3	8.4	9.8	10.0
. Italian	1.0	2.2	2.0	0.4	-	-
. Ukranian	0.9	-	1.3	0.4	2.0	10.0
. Dutch	2.3	3.6	2.0	2.1	2.0	-
. Polish	1.0	1.4	1.3	0.4	2.0	5.0
. N.A. Indian	0.4	-	-	0.8	2.0	-
. Inuit/Eskimo	-	-	-	-	-	-
. English	62.9	55.4	68.9	67.1	60.8	50.0
. Scottish	32.8	36.7	33.1	34.2	23.5	25.0
. Irish	17.6	16.5	15.9	19.8	21.6	5.0
. Chinese	0.9	2.9	-	1.3	-	-
. Jewish	2.4	4.3	2.0	0.4	5.9	10.0
. Black	0.3	0.7	-	0.4	-	-
. Metis	0.1	-	0.7	-	-	-
. Other	11.3	15.8	11.9	7.6	15.7	5.0
(#20) % AFFILIATED WITH ORGANIZATION						
. Yes	92.0	97.0	91.0	96.0	73.0	90.0
. No	8.0	3.0	9.0	4.0	27.0	10.0
	100.0	100.0	100.0	100.0	100.0	100.0

	TOTAL N=670	LITERARY ARTS N=142	VISUAL ARTS N=162	PERFORMING ARTS N=241	CRAFTS N=55	MEDIA ARTS/SOUND RECORDING N=22
(#20) ORGANIZATIONS (%) ≠100						
. ACTRA	11.1	10.1	2.1	17.7	-	31.6
. Atlantic Federation of Musicians	22.3	4.3	0.7	51.5	2.4	31.6
. Atlantic Publishers Assoc.	1.4	4.3	0.7	0.9	-	-
. Dance Nova Scotia	4.5	1.4	2.7	8.2	4.9	-
. Canadian Actors Equity Assoc.	4.2	-	-	10.8	-	5.3
. Federation of N.S. Heritage	2.7	3.6	1.4	1.7	4.9	-
. IATSE	1.6	0.7	0.7	1.3	-	21.1
. Multicultural Assoc. of N.S.	1.1	2.9	0.7	0.9	-	-
. Music Industry Assoc. of N.S.	5.0	1.4	0.7	10.8	-	10.5
. N.S. Choral Federation	5.3	2.9	1.4	10.4	-	5.3
. N.S. Drama League	6.1	5.1	-	11.3	2.4	5.3
. N.S. Designer Crafts Council	7.8	2.9	7.5	0.4	68.3	5.3
. Professional Assoc. of Canadian Theatres	0.9	0.7	0.7	1.3	2.4	-
. Visual Arts N.S.	22.8	2.9	80.8	-	19.5	-
. Writers Federation of N.S.	23.1	73.2	8.9	4.8	7.3	5.3
. Other	46.3	48.6	54.8	39.8	41.5	52.6
(#21) MARKET POTENTIAL (%) ≠100						
. Halifax Area	47.4	32.9	51.6	54.6	44.0	33.3
. Nova Scotia	59.3	57.9	58.0	60.8	66.0	47.6
. Canada	57.8	71.4	59.9	52.9	40.0	66.7
. United States	38.4	50.7	40.1	31.7	24.0	38.1
. United Kingdom	7.5	13.6	5.1	7.0	6.0	4.8
. Europe	11.3	8.6	10.8	13.7	8.0	23.8
. Other	6.3	5.0	6.4	6.6	10.0	4.8
(#23) TRAINING NEEDED (%) ≠100						
. Art skills/techniques	54.2	49.4	64.7	50.9	58.5	44.4
. Business skills	43.3	40.2	47.1	40.6	61.0	27.8
. Advanced technology in discipline	38.6	32.2	32.8	40.6	36.6	77.8
. Other	13.4	19.5	14.3	14.3	9.8	5.6

COMMENTS AND OPINIONS					
QUESTION #22	AGREE STRONGLY		NEUTRAL	DISAGREE STRONGLY	
	5	4	3	2	1
• The opportunity to do my own artistic cultural work is important to me.					
► TOTAL	82.0	11.0	6.2	0.2	-
► Literary Arts	90.0	7.0	2.8	-	-
► Visual Arts	91.0	7.7	1.3	-	-
► Performing Arts	74.0	14.0	12.0	0.4	-
► Crafts	84.0	16.0	-	-	-
► Media Arts/Sound Recording	47.6	33.3	19.0	-	-
• There are few opportunities for me to advance my career in arts and culture in Nova Scotia.					
► TOTAL					
► Literary Arts	20.0	25.0	28.0	17.0	10.0
► Visual Arts	15.0	27.0	28.0	21.0	8.8
► Performing Arts	21.0	24.0	28.0	15.0	12.0
► Crafts	24.0	23.0	28.0	14.0	11.0
► Media Arts/Sound Recording	15.0	25.0	28.0	25.0	7.5
	24.0	24.0	19.0	24.0	9.5
• I am frequently frustrated by the need to earn additional income through non-arts employment.					
► TOTAL	28.0	15.0	28.0	9.6	19.0
► Literary Arts	28.0	20.0	25.0	11.0	17.0
► Visual Arts	34.0	18.0	22.0	9.8	16.0
► Performing Arts	28.0	11.0	34.0	8.4	18.0
► Crafts	22.0	9.8	27.0	12.0	29.0
► Media Arts/Sound Recording	29.0	19.0	24.0	14.0	14.0
• Given the choice again I would choose to live and work in Nova Scotia.					
► TOTAL	61.0	18.0	12.0	5.1	3.7
► Literary Arts	60.0	17.0	16.0	4.3	3.6
► Visual Arts	62.0	18.0	12.0	5.7	1.9
► Performing Arts	55.0	20.0	14.0	6.0	5.5
► Crafts	73.0	13.0	9.1	1.8	3.6
► Media Arts/Sound Recording	67.0	14.0	9.5	4.8	4.8
• My ability to earn income from arts and cultural activities would be enhanced by training.					
► TOTAL					
► Literary Arts	19.0	27.0	31.0	13.0	11.0
► Visual Arts	16.0	20.0	33.0	16.0	15.0
► Performing Arts	15.0	25.0	30.0	15.0	14.0
► Crafts	24.0	30.0	29.0	9.2	7.5
► Media Arts/Sound Recording	17.0	31.0	31.0	12.0	9.6
	18.0	32.0	18.0	23.0	9.1
• I feel that I am part of a community that values art and cultural activities.					
► TOTAL	24.0	28.0	19.0	18.0	11.0
► Literary Arts	23.0	33.0	24.0	13.0	7.1
► Visual Arts	23.0	21.0	16.0	25.0	15.0
► Performing Arts	25.0	28.0	19.0	17.0	11.0
► Crafts	24.0	39.0	15.0	11.0	11.0
► Media Arts/Sound Recording	24.0	24.0	9.5	29.0	14.0

APPENDIX E

APPENDIX E

HALIFAX AS COMPARED TO ALL OTHER AREAS

	TOTAL N=670	HALIFAX AREA N=375	NON-HALIFAX N=295
(#1) MAIN ACTIVITIES (%)			
Literary Arts			
. Writing	21.3	20.8	21.6
. Editing	0.6	1.1	-
. Publishing	0.2	0.3	-
. Other	0.5	0.9	0.7
Visual Arts			
. Sculpture	1.4	1.7	1.1
. Painting	18.3	13.4	24.0
. Drawing	1.0	1.1	0.7
. Print-making	1.7	1.7	1.8
. Photography	1.3	1.4	1.1
. Other	2.1	2.3	1.8
Performing Arts			
. Music	26.2	28.2	23.3
. Dance	2.9	4.0	1.4
. Theatre	7.9	8.8	6.7
. Other	1.3	1.4	1.1
Crafts			
. Metal	0.5	0.3	0.7
. Wood	1.7	1.4	2.1
. Enamel	-	-	5.0
. Fibre	3.8	2.9	2.1
. Clay	1.4	0.9	1.8
. Other	1.3	0.6	1.7
Media Arts/Sound Recording			
. Film	1.6	2.6	0.4
. Video	0.8	1.1	0.4
. Sound Recording	1.0	1.1	0.7
. Other	0.2	0.2	-
Heritage			
. Historical Resources	0.8	0.6	1.1
. Other	-	-	-
Other			
-	0.3	0.3	0.4
	100.0	100.0	100.0

	TOTAL N=670	HALIFAX AREA N=375	NON-HALIFAX N=295
(#2) SECONDARY ACTIVITIES (%) ≠100			
Literary Arts			
. Writing	20.7	24.7	15.1
. Editing	16.3	17.6	14.6
. Publishing	11.0	11.8	9.8
. Other	4.8	4.7	4.9
Visual Arts			
. Sculpture	8.9	7.5	10.7
. Painting	12.6	13.6	11.2
. Drawing	25.0	22.9	27.8
. Print-making	10.1	7.9	13.2
. Photography	14.7	12.2	18.0
. Other	8.7	9.0	8.3
Performing Arts			
. Music	14.3	15.4	12.7
. Dance	9.1	11.1	6.3
. Theatre	17.1	17.9	16.1
. Other	7.2	9.0	4.9
Crafts			
. Metal	3.5	3.6	3.4
. Wood	7.6	6.8	8.8
. Enamel	1.0	1.1	1.0
. Fibre	3.9	2.9	5.4
. Clay	3.1	1.1	5.9
. Other	5.0	4.3	5.9
Media Arts/Sound Recording			
. Film	9.7	11.5	7.3
. Video	11.0	12.2	9.3
. Sound Recording	9.9	12.5	6.3
. Other	1.7	2.5	0.5
Heritage			
. Historical Resources	3.7	2.2	5.9
. Other	1.7	2.5	0.5
Other	2.3	2.2	2.4
(#1) MAIN DISCIPLINE IN 5 YEARS (%)			
Literary Arts			
. Writing	23.9	24.1	23.4
. Editing	0.2	0.3	-
. Publishing	0.2	0.3	-
. Other	0.6	0.9	0.4

	TOTAL N=670	HALIFAX AREA N=375	NON-HALIFAX N=295
Visual Arts			
. Sculpture	1.3	1.7	0.9
. Painting	18.5	13.9	24.2
. Drawing	0.6	0.3	0.9
. Print-making	2.1	1.4	3.0
. Photography	1.1	1.4	0.9
. Other	2.7	2.4	3.0
Performing Arts			
. Music	22.9	25.2	20.0
. Dance	3.0	4.1	1.7
. Theatre	7.6	7.8	7.4
. Other	1.3	1.7	0.9
Crafts			
. Metal	0.2	0.3	-
. Wood	1.7	1.4	2.2
. Enamel	-	-	-
. Fibre	2.9	2.4	3.5
. Clay	1.9	1.4	2.6
. Other	0.8	0.3	1.3
Media Arts/Sound Rec.			
. Film	2.3	3.7	0.4
. Video	1.1	1.7	0.4
. Sound Recording	1.7	1.4	2.2
. Other	0.2	0.3	-
Heritage			
. Historical Resources	0.4	0.7	-
. Other	-	-	-
Other	0.6	0.7	0.4
	100.0	100.0	100.0
(#2) PROFESSIONAL? (%)			
. Yes	73.0	76.0	69.0
. No	20.0	17.0	23.0
. Don't Know	7.0	7.1	8.0
	100.0	100.0	100.0
(#3) MAIN TYPE OF WORK - 1992 (%)	54.0	48.0	62.0
. Create	3.0	3.1	2.2
. Director	23.0	27.0	18.0
. Performer	2.0	3.1	1.1
. Technician	4.0	4.6	4.8
. Administration	9.0	9.4	8.1
. Education	5.0	5.5	3.7
. Other			
	100.0	100.0	100.0

	TOTAL N=670	HALIFAX AREA N=375	NON-HALIFAX N=295
(#3) SECONDARY TYPE OF WORK - 1992 (%) ≠100			
. Create	25.9	28.2	22.1
. Director	8.5	10.0	6.1
. Performer	12.2	12.3	11.9
. Technician	5.1	5.4	4.5
. Administration	13.0	12.6	13.5
. Education	29.9	26.2	35.7
. Other	5.5	5.4	6.1
(#3) MAIN TYPE OF WORK IN 5 YEARS (%)			
. Create	59.0	53.0	67.0
. Director	3.0	2.5	3.3
. Performer	18.0	21.0	14.0
. Technician	2.0	2.8	1.4
. Administration	5.0	4.6	5.2
. Education	9.0	11.0	6.6
. Other	4.0	5.7	2.0
	100.0	100.0	100.0
(#4) RECEIVED RECOGNITION? (%)			
. Yes	86.0	84.8	87.0
. No	14.0	15.2	13.0
	100.0	100.0	100.0
(#4) RECOGNITION RECEIVED (%) ≠100			
. Reviews in Local Publications	81.1	80.5	81.3
. Reviews in Regional Publications	59.0	57.2	61.1
. Reviews in National Publications	37.0	41.9	30.2
. Reviews in International Publications	17.3	17.6	17.1
. Juried Exhibitions	38.0	32.9	45.2
. Awards	45.0	47.3	42.5
. Prizes	19.1	20.4	17.5
. Scholarships	10.0	14.7	5.2
. Other	8.1	8.6	12.7
(#5) YEAR ROUND EMPLOYMENT (%)	87.0	87.0	87.0
(#5) SEASONAL EMPLOYMENT (%)	13.0	13.0	13.0
	100.0	100.0	100.0
(#5) IF SEASONAL - AVERAGE WEEKS PER YEAR (No.)	25.1	27.7	21.9

	TOTAL N=670	HALIFAX AREA N=375	NON-HALIFAX N=295
(#5) IF SEASONAL - WHICH SEASONS? (%) ≠100			
. Summer	40.2	28.9	54.1
. Fall	65.9	80.0	48.6
. Winter	76.8	86.7	64.9
. Spring	61.0	75.6	43.2
(#6) FULL TIME EMPLOYMENT (%)	48.0	49.0	47.0
(#6) PART TIME EMPLOYMENT (%)	52.0	51.0	53.0
	100.0	100.0	100.0
(#6) IF PART TIME - AVERAGE HOURS PER WEEK (No.)	16.1	16.2	16.0
(#7) EMPLOYMENT CATEGORY - MAIN (%)			
. Self-employed/free lance	68.3	67.9	68.7
. Owner of small business	3.3	2.5	4.4
. Member of family business	1.3	0.5	2.2
. Member of a co-op	0.9	0.5	1.5
. Salaried employee	11.4	12.0	11.2
. Hourly rated employee	2.3	3.6	0.7
. Other	3.6	3.6	3.6
. N/A	8.8	9.9	7.3
	100.0	100.0	100.0
(#7) EMPLOYMENT CATEGORY - SECONDARY (%) ≠100			
. Self-employed/free lance	81.8	85.2	76.7
. Owner of small business	9.7	8.5	11.6
. Member of family business	2.5	1.6	3.9
. Member of a co-op	6.9	6.9	7.0
. Salaried employee	8.5	7.9	9.3
. Hourly rated employee	12.9	16.4	7.8
. Other	5.7	6.3	4.7
. N/A	7.2	6.9	7.8
(#8) OWNER OF A SMALL ARTS AND CULTURE BUSINESS? (%)			
. Yes	18.0	16.0	21.0
. No	82.0	84.0	79.0
	100.0	100.0	100.0

	TOTAL N=670	HALIFAX AREA N=375	NON-HALIFAX N=295
(#9) % REPRESENTED BY ≠100:			
. Dealer	11.6	8.9	15.0
. Publisher	10.7	12.0	9.4
. Agent	11.8	16.0	6.7
. Marketing Organization	2.6	2.5	3.0
. Co-op	4.7	4.9	4.5
. Other	13.3	13.5	13.1
. None of the Above	55.8	53.7	58.4
(#10) ARTS AND CULTURE INCOME - 1992 (%)			
. 100%	29.7	31.8	27.1
. 90-99%	2.5	3.3	1.4
. 80-89%	2.8	2.2	3.6
. 70-79%	2.5	2.8	2.1
. 60-69%	2.5	2.8	2.1
. 50-59%	4.1	4.2	4.0
. 40-49%	1.9	1.7	2.1
. 30-39%	2.5	2.5	2.5
. 20-29%	8.3	6.1	11.1
. 10-19%	7.2	6.7	7.9
. 1-9%	23.8	23.1	24.6
. 0%	12.2	12.8	11.4
	100.0	100.0	100.0
(#10) ARTS AND CULTURE INCOME - 5 YEARS AGO (%)			
. 100%	26.8	29.7	23.1
. 90-99%	3.1	4.2	1.6
. 80-89%	2.4	2.7	2.0
. 70-79%	1.7	1.8	1.6
. 60-69%	2.6	2.4	2.8
. 50-59%	3.4	3.3	4.0
. 40-49%	1.2	1.8	0.4
. 30-39%	3.8	2.7	5.1
. 20-29%	5.0	3.6	6.7
. 10-19%	9.4	8.8	10.2
. 1-9%	19.5	20.3	18.4
. 0%	21.0	18.5	24.3
	100.0	100.0	100.0

	TOTAL N=670	HALIFAX AREA N=375	NON-HALIFAX N=295
#10) ARTS AND CULTURE INCOME - 5 YEARS FROM NOW (%)			
. 100%	36.5	40.1	32.0
. 90-99%	5.3	5.8	4.8
. 80-89%	3.9	3.2	4.8
. 70-79%	4.1	3.9	4.4
. 60-69%	2.5	2.6	2.4
. 50-59%	5.5	5.8	5.2
. 40-49%	2.7	2.2	3.2
. 30-39%	3.4	2.6	4.4
. 20-29%	8.2	7.4	9.2
. 10-19%	7.8	7.1	8.8
. 1-9%	12.1	12.8	11.2
. 0%	7.8	6.7	9.2
	100.0	100.0	100.0
(#11) AVERAGE YEARS EARNING ARTS AND CULTURE INCOME (No.)	13.5	13.8	13.1
(#12) WAYS ARTS AND CULTURE INCOME IS RECEIVED (%) ≠100			
. Commissions	27.3	25.1	30.1
. Royalties	20.9	22.9	18.4
. Copyrights	7.1	5.8	8.9
. Fees	41.1	44.2	37.2
. Sales	39.2	32.3	48.2
. Salaries	21.5	25.1	17.0
. Wages	19.2	23.2	14.2
. Grants	14.7	16.6	12.4
. Awards	8.6	8.3	9.2
. Tax Receipts	5.5	6.4	4.6
. Other	11.6	11.6	11.7
. N/A	7.2	7.5	7.1
(#12) MOST FINANCIALLY REWARDING WAY (%)			
. Commissions	9.8	9.3	10.4
. Royalties	6.7	4.2	10.0
. Copyrights	-	-	-
. Fees	16.3	20.8	10.4
. Sales	26.3	19.1	35.7
. Salaries	17.7	19.5	15.4
. Wages	11.7	14.0	8.8
. Grants	1.0	1.7	-
. Awards	1.7	2.1	1.1
. Tax Receipts	0.2	-	0.6
. Other	7.2	8.1	6.0
. N/A	1.2	1.3	1.1
	100.0	100.0	100.0

	TOTAL N=670	HALIFAX AREA N=375	NON-HALIFAX N=295
(#13) MARKET - %			
. N.S. Residents	66.8	68.4	64.8
. N.S. Tourists/Visitors	12.4	10.5	14.7
. Canada	14.1	15.6	12.3
. United States	4.5	3.3	5.9
. Other	2.2	2.2	2.6
	100.0	100.0	100.0
(#14) WHERE WORK IS CREATED (%) ≠100			
. Own residence	82.0	79.9	84.8
. Purpose-designed facility	36.0	42.2	30.0
. Community spaces	27.0	28.2	25.8
. Vacant commercial	3.0	2.8	3.2
. Shared use	10.0	11.2	8.8
. Other	8.0	8.9	7.1
(#14) WHERE WORK IS CREATED MOST OFTEN (%)			
. Own residence			
. Purpose-designed facility	67.0	63.0	72.0
. Community spaces	19.0	22.0	15.0
. Vacant commercial	6.1	5.7	6.6
. Shared use	1.0	0.6	1.5
. Other	2.4	3.5	1.2
	4.3	5.0	3.5
	100.0	100.0	100.0
(#15) WHERE WORK IS PRESENTED (%) ≠100			
. Own/other residence	31.0	24.4	40.7
. Purpose-designed facility	54.0	55.3	54.2
. Community spaces	46.0	44.7	49.1
. Vacant commercial	2.7	2.2	3.3
. Shared use	16.0	18.3	13.8
. Other	19.0	22.8	14.9
. N/A	12.0	13.3	11.3
(#15) WHERE PRESENTED MOST OFTEN (%)			
. Own/other residence	16.0	13.0	19.0
. Purpose-designed facility	37.0	39.0	35.0
. Community spaces	19.0	17.0	21.0
. Vacant commercial	1.0	0.7	1.3
. Shared use	4.7	5.5	3.6
. Other	15.0	16.0	13.0
. N/A	8.2	9.3	6.7
	100.0	100.0	100.0
(#16) AVERAGE ARTS AND CULTURE EXPENDITURE ($)	$12,555.00	$15,125.00	$8,725.00

	TOTAL N=670	HALIFAX AREA N=375	NON-HALIFAX N=295
(#17) EXPENDITURES (%)			
. Supplies	36.4	35.8	39.3
. Travel	14.3	13.5	16.3
. Equipment	19.2	19.4	20.4
. Training	5.4	6.0	5.0
. Staff	2.9	2.3	4.0
. Sales/Commissions	2.7	2.4	6.9
. Advertising/Marketing	3.5	3.6	2.1
. Rent - Work	3.6	3.9	1.9
. Rent - Perform	1.4	1.3	2.0
. Other	10.5	11.8	3.3
	100.0	100.0	100.0
(#17) % EXPENDITURES WITHIN NOVA SCOTIA	83.4	86.6	79.0
(#18) GENERATE NON ARTS AND CULTURE INCOME? (%)			
. Yes	73.0	68.0	79.0
. No	26.0	31.0	21.0
	100.0	100.0	100.0
(#18)IF YES, HOW? (%) ≠100			
. Owner of non-arts business	7.0	7.1	6.9
. Non-arts professional employment	19.6	20.3	18.9
. Support from family	13.2	12.7	13.8
. Government employee	9.7	11.0	8.2
. Skilled trade	5.1	5.4	4.7
. Retail/service	5.1	6.2	3.8
. Manufacturing	1.2	0.6	1.9
. Resource Sector	1.0	0.3	1.9
. Farmer	1.5	-	3.1
. UIC	10.4	11.6	10.1
. Pension Plan	13.7	13.0	14.5
. Other	12.5	12.7	12.3
(#18) MOST FINANCIALLY REWARDING (%)			
. Owner of non-arts business	6.7	5.0	8.6
. Non-arts professional employment	24.4	26.4	22.1
. Support from family	7.0	6.9	7.1
. Government employee	13.0	12.6	13.6
. Skilled trade	4.4	3.8	5.0
. Retail/service	5.4	7.6	2.9
. Manufacturing	0.7	1.3	-
. Resource Sector	1.0	0.6	1.4
. Farmer	1.7	-	3.6
. UIC	8.0	8.2	7.9
. Pension Plan	16.4	15.7	17.1
. Other	11.4	11.9	10.7
	100.0	100.0	100.0

	TOTAL N=670	HALIFAX AREA N=375	NON-HALIFAX N=295
(#19) GENDER (%)			
. Male	50.0	51.0	48.0
. Female	50.0	49.0	52.0
	100.0	100.0	100.0
(#19) AGE (%)			
. < 25 years	4.7	6.4	2.4
. 25-34 years	17.0	19.0	15.0
. 35-44 years	34.0	34.0	36.0
. 45-54 years	23.0	21.0	24.0
. 55-64 years	12.0	10.0	14.0
. 65+ years	9.4	9.6	9.1
	100.0	100.0	100.0
(#19) AVERAGE YEARS IN NOVA SCOTIA (No.)	26.9	24.8	29.7
(#19) COUNTY OF RESIDENCE (%)			
. Annapolis	3.5	-	8.3
. Antigonish	2.3	-	5.4
. Cape Breton	7.5	-	17.6
. Colchester	3.2	-	7.6
. Cumberland	0.6	-	1.4
. Digby	1.7	-	4.0
. Guysborough	0.3	-	0.7
. Halifax	57.4	100.0	-
. Hants	1.8	-	4.3
. Inverness	3.1	-	7.2
. Kings	5.2	-	12.2
. Lunenburg	4.9	-	11.5
. Pictou	2.1	-	5.0
. Queens	0.8	-	1.8
. Richmond	0.8	-	1.8
. Shelburne	0.6	-	1.4
. Victoria	1.5	-	3.6
. Yarmouth	2.6	-	6.1
	100.0	100.0	100.0
(#19) FORMAL EDUCATION (%)			
. University graduate	32.0	31.0	32.0
. University undergraduate	31.0	33.0	28.0
. College	21.0	21.0	21.0
. High School	14.0	13.0	15.0
. Elementary School	2.3	1.3	3.5
	100.0	100.0	100.0
(#19) OTHER FORMS OF TRAINING ≠100			
. Workshops	79.0	83.5	74.9
. Apprenticeship	25.0	29.7	19.5
. Self-taught	72.0	69.2	76.4
. Other	17.0	16.7	18.7

	TOTAL N=670	HALIFAX AREA N=375	NON-HALIFAX N=295
(#19) 1991 TOTAL INCOME (%)			
. < $15,000	31.7	28.3	36.0
. $15,001 - $20,000	12.4	12.5	12.4
. $20,001 - $25,000	10.2	10.3	10.2
. $25,001 - $30,000	7.7	8.3	6.9
. $30,001 - $35,000	7.6	8.3	6.6
. $35,001 - $40,000	7.1	5.6	9.1
. $40,001 - $45,000	4.4	5.6	3.0
. $45,001 - $50,000	5.0	5.6	4.4
. $50,001 - $60,000	6.0	6.1	5.8
. $60,001 - $75,000	4.4	5.0	3.6
. $75,001 - $90,000	1.9	2.5	1.1
. > $90,000	1.6	1.9	1.1
	100.0	100.0	100.0
(#19) % COVERED BY ≠100			
. UIC	40.1	40.8	39.1
. CPP	47.7	49.3	45.8
. Workers Compensation	18.2	19.2	17.0
. Medical Insurance	48.2	51.3	44.3
. Disability Insurance	31.3	34.1	27.7
. Life Insurance	34.8	35.2	34.3
. Pension Plan/RRSP	32.6	35.5	28.8
. None	20.4	17.2	24.7
(#19) % COVERED THROUGH ARTS	14.0	15.0	13.9
(#19) ETHNIC/CULTURAL GROUP (%) ≠100			
. French	16.5	12.4	21.8
. German	8.4	8.6	8.2
. Italian	1.0	1.1	1.0
. Ukranian	0.9	1.4	0.4
. Dutch	2.3	3.0	1.4
. Polish	1.0	0.8	1.4
. N.A. Indian	0.4	0.3	0.7
. Inuit/Eskimo	-	-	-
. English	62.9	66.0	58.9
. Scottish	32.8	32.0	33.9
. Irish	17.6	18.5	16.4
. Chinese	0.9	1.4	0.4
. Jewish	2.4	3.6	1.1
. Black	0.3	0.3	0.4
. Metis	0.1	0.3	-
. Other	11.3	12.2	10.4
(#20) % AFFILIATED WITH ORGANIZATION			
. Yes	92.0	94.0	89.0
. No	8.0	5.1	11.0
	100.0	100.0	100.0

	TOTAL N=670	HALIFAX AREA N=375	NON-HALIFAX N=295
(#20) ORGANIZATIONS (%) ≠100			
. ACTRA	11.1	13.9	7.3
. Atlantic Federation of Musicians	22.3	26.1	17.3
. Atlantic Publishers Assoc.	1.4	1.1	1.9
. Dance Nova Scotia	4.5	6.8	1.5
. Canadian Actors Equity Assoc.	4.2	4.8	3.5
. Federation of N.S. Heritage	2.7	3.7	1.5
. IATSE	1.6	2.5	0.4
. Multicultural Assoc. of N.S.	1.1	0.8	1.5
. Music Industry Assoc. of N.S.	5.0	4.8	5.4
. N.S. Choral Federation	5.3	5.1	5.8
. N.S. Drama League	6.1	7.4	4.6
. N.S. Designer Crafts Council	7.8	7.6	8.1
. Professional Assoc. of Canadian Theatres	0.9	-	2.3
. Visual Arts N.S.	22.8	19.0	28.1
. Writers Federation of N.S.	23.1	23.2	23.1
. Other	46.3	45.9	46.9
(#21) MARKET POTENTIAL (%) ≠100			
. Halifax Area	47.4	57.3	34.8
. Nova Scotia	59.3	52.8	67.8
. Canada	57.8	60.6	54.3
. United States	38.4	39.1	37.7
. United Kingdom	7.5	7.8	7.2
. Europe	11.3	11.7	10.9
. Other	6.3	3.4	10.1
(#23) TRAINING NEEDED (%) ≠100			
. Art skills/techniques	54.2	52.9	56.0
. Business skills	43.3	43.7	43.0
. Advanced technology in discipline	38.6	41.8	34.8
. Other	13.4	12.6	14.5

COMMENTS AND OPINIONS

QUESTION #22	AGREE STRONGLY		NEUTRAL	DISAGREE STRONGLY	
	5	4	3	2	1
• The opportunity to do my own artistic cultural work is important to me.					
► Halifax Area	79.0	13.0	8.2	0.3	-
► All Other Areas	87.0	9.9	3.5	-	-
• There are few opportunities for me to advance my career in arts and culture in Nova Scotia.					
► Halifax Area	20.0	28.0	25.0	15.0	12.0
► All Other Areas	19.0	21.0	32.0	19.0	8.6
• I am frequently frustrated by the need to earn additional income through non-arts employment.					
► Halifax Area	27.0	14.0	29.0	10.0	20.0
► All Other Areas	31.0	17.0	26.0	8.7	17.0
• Given the choice I would choose to live and work in Nova Scotia.					
► Halifax Area	55.0	21.0	15.0	5.7	3.0
► All Other Areas	68.0	13.0	9.5	4.2	4.6
•My ability to earn income from arts and culture activities would be enhanced by training.					
► Halifax Area	20.0	27.0	30.0	13.0	9.6
► All Other Areas	17.0	27.0	31.0	12.0	13.0
• I feel that I am part of a community that values art and cultural activities.					
► Halifax Area	22.0	29.0	19.0	18.0	12.0
► All Other Areas	26.0	27.0	19.0	18.0	10.0

APPENDIX F

APPENDIX F

FULL-TIME COMPARED TO PART-TIME ARTISTS

	TOTAL N=670	FULL TIME N=301	PART TIME N=326
(#1) MAIN ACTIVITIES (%)			
Literary Arts			
Writing	21.3	14.2	25.4
Editing	0.6	1.1	0.3
Publishing	0.2	0.4	-
Other	0.5	1.0	0.6
Visual Arts			
Sculpture	1.4	1.8	1.0
Painting	18.3	19.6	17.7
Drawing	1.0	0.4	1.6
Print-making	1.7	3.5	0.3
Photography	1.3	1.8	1.0
Other	2.1	2.9	1.0
Performing Arts			
Music	26.2	26.0	26.7
Dance	2.9	2.8	1.9
Theatre	7.9	10.5	5.5
Other	1.3	0.7	1.9
Crafts			
Metal	0.5	0.7	0.3
Wood	1.7	2.1	1.6
Enamel	-	-	-
Fibre	3.8	1.4	6.4
Clay	1.4	2.1	1.0
Other	1.3	0.7	1.2
Media Arts/Sound Recording			
Film	1.6	2.1	1.3
Video	0.8	1.4	0.3
Sound Recording	1.0	1.1	0.6
Other	0.2	-	0.3
Heritage			
Historical Resources	0.8	0.4	1.6
Other	-	-	-
Other			
-	0.3	0.4	0.3
	100.0	100.0	100.0

	TOTAL N=670	FULL TIME N=301	PART TIME N=326
(#1) SECONDARY ACTIVITIES (%) =100			
Literary Arts			
. Writing	20.7	25.3	18.9
. Editing	16.3	12.7	20.8
. Publishing	11.0	10.0	12.2
. Other	4.8	4.4	4.5
Visual Arts			
. Sculpture	8.9	10.5	8.1
. Painting	12.6	8.7	15.3
. Drawing	25.0	25.8	26.1
. Print-making	10.1	10.9	9.9
. Photography	14.7	11.8	17.1
. Other	8.7	10.0	7.2
Performing Arts			
. Music	14.3	10.0	17.6
. Dance	9.1	7.9	8.6
. Theatre	17.1	15.3	17.6
. Other	7.2	8.3	5.9
Crafts			
. Metal	3.5	4.4	3.2
. Wood	7.6	5.2	9.0
. Enamel	1.0	1.3	0.9
. Fibre	3.9	3.1	4.5
. Clay	3.1	1.3	4.5
. Other	5.0	5.2	4.1
Media Arts/Sound Recording			
. Film	9.7	10.0	9.9
. Video	11.0	11.4	10.4
. Sound Recording	9.9	10.5	10.4
. Other	1.7	0.9	1.8
Heritage			
. Historical Resources	3.7	3.9	4.1
. Other	1.7	1.3	3.6
Other			
-	2.3	2.6	2.3
(#1) MAIN DISCIPLINE IN 5 YEARS (%)			
Literary Arts			
. Writing	23.9	17.4	28.6
. Editing	0.2	-	0.4
. Publishing	0.2	-	0.4
. Other	0.6	0.4	1.1

	TOTAL N=670	FULL TIME N=301	PART TIME N=326
Visual Arts			
. Sculpture	1.3	1.3	1.2
. Painting	18.5	19.1	19.1
. Drawing	0.6	0.4	0.8
. Print-making	2.1	4.4	-
. Photography	1.1	1.3	1.2
. Other	2.7	4.8	0.8
Performing Arts			
. Music	22.9	23.5	21.4
. Dance	3.0	3.5	2.3
. Theatre	7.6	9.6	5.7
. Other	1.3	1.3	1.5
Crafts			
. Metal	0.2	0.4	-
. Wood	1.7	1.7	1.9
. Enamel	-	-	-
. Fibre	2.9	1.3	4.6
. Clay	1.9	2.6	1.5
. Other	0.8	0.4	1.2
Media Arts/Sound Rec.			
. Film	2.3	2.6	1.9
. Video	1.1	2.2	0.4
. Sound Recording	1.7	1.3	1.9
. Other	0.2	-	0.4
Heritage			
. Historical Resources	0.4	-	0.8
. Other	-	-	-
Other			
-	0.6	0.4	0.4
	100.0	100.0	100.0
(#2) PROFESSIONAL? (%)			
. Yes	73.0	95.0	58.0
. No	20.0	3.0	31.0
. Don't Know	7.0	2.0	12.0
	100.0	100.0	100.0
(#3) MAIN TYPE OF WORK - 1992 (%)			
. Create	54.0	54.2	55.0
. Director	3.0	3.2	2.6
. Performer	23.0	23.2	22.0
. Technician	2.0	2.8	1.9
. Administration	4.0	4.6	4.9
. Education	9.0	8.5	9.1
. Other	5.0	3.5	5.0
	100.0	100.0	100.0

	TOTAL N=670	FULL TIME N=301	PART TIME N=326
(#3) SECONDARY TYPE OF WORK - 1992 (%) ≠100			
. Create	25.9	23.5	29.2
. Director	8.5	10.7	6.1
. Performer	12.2	11.0	12.5
. Technician	5.1	4.3	6.1
. Administration	13.0	16.5	8.0
. Education	29.9	27.5	33.0
. Other	5.5	6.4	5.3
(#3) MAIN TYPE OF WORK IN 5 YEARS (%)			
. Create	59.0	60.4	59.0
. Director	3.0	3.5	2.4
. Performer	18.0	18.3	17.0
. Technician	2.0	2.2	2.4
. Administration	5.0	5.7	4.5
. Education	9.0	7.0	10.0
. Other	4.0	2.2	4.1
	100.0	100.0	100.0
(#4) RECEIVED RECOGNITION? (%)			
. Yes	86.0	93.0	80.0
. No	14.0	6.4	20.0
	100.0	100.0	100.0
(#4) RECOGNITION RECEIVED (%) ≠100			
. Reviews in Local Publications	81.1	85.7	75.2
. Reviews in Regional Publications	59.0	70.4	46.5
. Reviews in National Publications	37.0	51.8	19.8
. Reviews in International Publications	17.3	25.7	7.8
. Juried Exhibitions	38.0	46.4	31.0
. Awards	45.0	48.6	42.6
. Prizes	19.1	17.1	22.1
. Scholarships	10.0	11.1	10.1
. Other	8.1	7.5	8.5
(#5) YEAR ROUND EMPLOYMENT (%)	87.0	92.0	83.0
(#5) SEASONAL EMPLOYMENT (%)	13.0	8.0	17.0
	100.0	100.0	100.0
(#5) IF SEASONAL - AVERAGE WEEKS PER YEAR (No.)	25.1	33.5	20.9

	TOTAL N=670	FULL TIME N=301	PART TIME N=326
(#5) IF SEASONAL - WHICH SEASONS? (%) ≠100			
. Summer	40.2	23.1	48.1
. Fall	65.9	88.5	57.4
. Winter	76.8	92.3	70.4
. Spring	61.0	80.8	53.7
(#6) FULL TIME EMPLOYMENT (%)	48.0	100.0	-
(#6) PART TIME EMPLOYMENT (%)	52.0	-	100.0
	100.0	100.0	100.0
(#6) IF PART TIME - AVERAGE HOURS PER WEEK (No.)	16.1	-	14.9
(#7) EMPLOYMENT CATEGORY - MAIN (%)			
. Self-employed/free lance	68.3	70.0	69.1
. Owner of small business	3.3	4.4	2.6
. Member of family business	1.3	1.0	1.3
. Member of a co-op	0.9	0.3	1.6
. Salaried employee	11.4	19.0	4.8
. Hourly rated employee	2.3	1.7	3.2
. Other	3.6	1.5	4.8
. N/A	8.8	1.5	12.7
	100.0	100.0	100.0
(#7) EMPLOYMENT CATEGORY - SECONDARY (%) ≠100			
. Self-employed/free lance	81.8	92.9	66.1
. Owner of small business	9.7	10.9	8.7
. Member of family business	2.5	3.8	0.8
. Member of a co-op	6.9	7.6	6.3
. Salaried employee	8.5	7.1	11.0
. Hourly rated employee	12.9	12.5	11.8
. Other	5.7	4.3	7.9
. N/A	7.2	4.3	12.6
(#8) OWNER OF A SMALL ARTS AND CULTURE BUSINESS? (%)			
. Yes	18.0	26.0	12.0
. No	82.0	74.0	88.0
	100.0	100.0	100.0

	TOTAL N=670	FULL TIME N=301	PART TIME N=326
(#9) % REPRESENTED BY (≠100)			
. Dealer	11.6	17.2	6.6
. Publisher	10.7	13.9	8.4
. Agent	11.8	16.1	9.1
. Marketing Organization	2.6	3.6	2.1
. Co-op	4.7	6.2	3.5
. Other	13.3	13.1	15.0
. None of the Above	55.8	44.9	64.1
(#10) ARTS AND CULTURE INCOME - 1992 (%)			
. 100%	29.7	53.6	8.4
. 90-99%	2.5	4.1	1.3
. 80-89%	2.8	4.4	1.6
. 70-79%	2.5	3.4	1.9
. 60-69%	2.5	3.1	2.3
. 50-59%	4.1	5.8	2.9
. 40-49%	1.9	2.7	1.0
. 30-39%	2.5	1.4	3.9
. 20-29%	8.3	5.4	11.3
. 10-19%	7.2	4.1	10.6
. 1-9%	23.8	9.2	37.6
. 0%	12.2	3.1	17.4
	100.0	100.0	100.0
(#10) ARTS AND CULTURE INCOME - 5 YEARS AGO (%)			
. 100%			
. 90-99%	26.8	45.1	9.9
. 80-89%	3.1	5.1	1.4
. 70-79%	2.4	3.3	1.8
. 60-69%	1.7	3.3	0.4
. 50-59%	2.6	2.9	2.5
. 40-49%	3.4	4.4	3.2
. 30-39%	1.2	1.5	0.7
. 20-29%	3.8	4.4	3.5
. 10-19%	5.0	5.5	5.0
. 1-9%	9.4	5.9	13.4
. 0%	19.5	8.8	29.7
	21.0	9.9	28.6
	100.0	100.0	100.0

	TOTAL N=670	FULL TIME N=301	PART TIME N=326
(#10) ARTS AND CULTURE INCOME - 5 YEARS FROM NOW (%)			
. 100%	36.5	61.9	11.6
. 90-99%	5.3	7.1	4.1
. 80-89%	3.9	5.2	3.0
. 70-79%	4.1	4.5	3.8
. 60-69%	2.5	3.0	2.3
. 50-59%	5.5	3.4	8.2
. 40-49%	2.7	1.1	4.5
. 30-39%	3.4	2.6	4.5
. 20-29%	8.2	4.5	12.0
. 10-19%	7.8	3.0	13.1
. 1-9%	12.1	3.0	19.5
. 0%	7.8	0.8	13.5
	100.0	100.0	100.0
(#11) AVERAGE YEARS EARNING ARTS AND CULTURE INCOME (No.)	13.5	15.4	11.8
(#12) WAYS ARTS AND CULTURE INCOME IS RECEIVED (%) ≠100			
. Commissions	27.3	33.8	22.8
. Royalties	20.9	24.7	17.6
. Copyrights	7.1	10.5	4.2
. Fees	41.1	53.0	31.7
. Sales	39.2	41.9	38.8
. Salaries	21.5	34.8	10.6
. Wages	19.2	20.3	19.6
. Grants	14.7	22.3	8.7
. Awards	8.6	9.8	8.3
. Tax Receipts	5.5	5.1	6.4
. Other	11.6	12.2	10.9
. N/A	7.2	1.0	10.6
(#12) MOST FINANCIALLY REWARDING WAY (%)			
. Commissions	9.8	8.7	10.9
. Royalties	6.7	4.6	8.2
. Copyrights	-	-	-
. Fees	16.3	16.0	16.9
. Sales	26.3	27.0	25.7
. Salaries	17.7	26.0	8.2
. Wages	11.7	8.7	15.8
. Grants	1.0	0.5	1.1
. Awards	1.7	0.9	2.7
. Tax Receipts	0.2	0.5	-
. Other	7.2	6.9	8.2
. N/A	1.2	-	2.2
	100.0	100.0	100.0

	TOTAL N=670	FULL TIME N=301	PART TIME N=326
(#13) MARKET - %			
. N.S. Residents	66.8	60.7	72.8
. N.S. Tourists/Visitors	12.4	13.1	12.0
. Canada	14.1	18.6	9.9
. United States	4.5	4.9	3.7
. Other	2.2	2.7	1.7
	100.0	100.0	100.0
(#14) WHERE WORK IS CREATED (%) =100			
. Own residence	82.0	79.9	85.4
. Purpose-designed facility	36.0	48.8	27.1
. Community spaces	27.0	26.6	28.0
. Vacant commercial	3.0	5.8	0.6
. Shared use	10.0	13.7	7.3
. Other	8.0	6.5	9.2
(#14) WHERE WORK IS CREATED MOST OFTEN (%)			
. Own residence			
. Purpose-designed facility	67.0	59.0	75.0
. Community spaces	19.0	27.0	12.0
. Vacant commercial	6.1	3.4	8.1
. Shared use	1.0	2.3	-
. Other	2.4	4.2	0.7
	4.3	4.2	3.9
	100.0	100.0	100.0
(#15) WHERE WORK IS PRESENTED (%) =100			
. Own/other residence	31.0	31.7	32.4
. Purpose-designed facility	54.0	66.6	45.8
. Community spaces	46.0	47.6	47.4
. Vacant commercial	2.7	2.8	2.6
. Shared use	16.0	17.9	16.3
. Other	19.0	20.0	20.2
. N/A	12.0	9.7	11.9
(#15) WHERE PRESENTED MOST OFTEN (%)			
. Own/other residence	16.0	17.0	15.0
. Purpose-designed facility	37.0	45.0	31.0
. Community spaces	19.0	11.0	25.0
. Vacant commercial	1.0	0.4	1.6
. Shared use	4.7	4.3	5.1
. Other	15.0	15.0	16.0
. N/A	8.2	7.3	6.6
	100.0	100.0	100.0
(#16) AVERAGE ARTS AND CULTURE EXPENDITURE ($)	$12,555.00	$23,247.00	$3,574.00

	TOTAL N=670	FULL TIME N=301	PART TIME N=326
(#17) EXPENDITURES (%)			
. Supplies	36.4	34.1	38.7
. Travel	14.3	15.9	12.5
. Equipment	19.2	17.3	21.0
. Training	5.4	3.8	6.5
. Staff	2.9	4.6	1.2
. Sales/Commissions	2.7	3.4	2.3
. Advertising/Marketing	3.5	4.1	2.9
. Rent - Work	3.6	5.1	2.5
. Rent - Perform	1.4	1.6	1.3
. Other	10.5	10.0	11.1
	100.0	100.0	100.0
(#17) % EXPENDITURES WITHIN NOVA SCOTIA	83.4	80.8	86.0
(#18) GENERATE NON ARTS AND CULTURE INCOME? (%)			
. Yes	73.3	55.5	88.0
. No	26.7	44.5	12.0
	100.0	100.0	100.0
(#18) IF YES, HOW? (%) ≠100			
. Owner of non-arts business	7.0	6.4	7.2
. Non-arts professional employment	19.6	14.5	22.2
. Support from family	13.2	16.2	12.0
. Government employee	9.7	7.3	11.0
. Skilled trade	5.1	5.1	5.2
. Retail/service	5.1	4.7	5.2
. Manufacturing	1.2	1.3	1.2
. Resource Sector	1.0	0.9	1.2
. Farmer	1.5	1.7	1.2
. UIC	10.4	15.0	8.0
. Pension Plan	13.7	13.7	13.0
. Other	12.5	13.2	12.5
(#18) MOST FINANCIALLY REWARDING (%)			
. Owner of non-arts business	6.7	5.2	7.7
. Non-arts professional employment	24.4	17.7	27.9
. Support from family	7.0	8.3	6.6
. Government employee	13.0	9.4	14.2
. Skilled trade	4.4	4.2	4.9
. Retail/service	5.4	4.2	6.0
. Manufacturing	0.7	2.1	-
. Resource Sector	1.0	-	1.6
. Farmer	1.7	2.1	1.1
. UIC	8.0	16.7	3.3
. Pension Plan	16.4	20.8	13.7
. Other	11.4	9.4	13.1
	100.0	100.0	100.0

	TOTAL N=670	FULL TIME N=301	PART TIME N=326
(#19) GENDER (%)			
. Male	50.0	56.0	46.0
. Female	50.0	44.0	54.0
	100.0	100.0	100.0
(#19) AGE (%)			
. < 25 years	4.7	3.7	5.6
. 25-34 years	17.0	21.0	14.0
. 35-44 years	34.0	38.0	32.0
. 45-54 years	23.0	23.0	23.0
. 55-64 years	12.0	8.4	14.0
. 65+ years	9.4	6.1	11.0
	100.0	100.0	100.0
(#19) AVERAGE YEARS IN NOVA SCOTIA (No.)	26.9	23.8	29.9
(#19) COUNTY OF RESIDENCE (%)			
. Annapolis	3.5	3.1	3.8
. Antigonish	2.3	3.1	1.9
. Cape Breton	7.5	6.9	9.1
. Colchester	3.2	2.4	3.8
. Cumberland	0.6	0.7	0.3
. Digby	1.7	1.4	1.6
. Guysborough	0.3	0.7	-
. Halifax	57.4	59.8	56.6
. Hants	1.8	1.4	1.6
. Inverness	3.1	1.4	4.7
. Kings	5.2	7.2	3.1
. Lunenburg	4.9	5.5	4.4
. Pictou	2.1	0.7	3.4
. Queens	0.8	1.0	0.3
. Richmond	0.8	0.7	0.6
. Shelburne	0.6	0.3	0.6
. Victoria	1.5	1.7	1.6
. Yarmouth	2.6	2.1	2.8
	100.0	100.0	100.0
(#19) FORMAL EDUCATION (%)			
. University graduate	32.0	30.0	32.0
. University undergraduate	31.0	38.0	26.0
. College	21.0	19.0	24.0
. High School	14.0	12.0	15.0
. Elementary School	2.0	1.0	3.0
	100.0	100.0	100.0
(#19) OTHER FORMS OF TRAINING (%) ≠100			
. Workshops	79.0	81.4	78.4
. Apprenticeship	25.0	20.6	32.7
. Self-taught	72.0	70.8	75.5
. Other	17.0	16.3	18.3

	TOTAL N=670	FULL TIME N=301	PART TIME N=326
(#19) 1991 TOTAL INCOME (%)			
< $15,000	31.7	27.9	35.4
$15,001 - $20,000	12.4	15.7	9.6
$20,001 - $25,000	10.2	10.8	10.2
$25,001 - $30,000	7.7	11.5	4.8
$30,001 - $35,000	7.6	7.7	7.3
$35,001 - $40,000	7.1	6.6	6.7
$40,001 - $45,000	4.4	4.5	4.1
$45,001 - $50,000	5.0	4.9	5.4
$50,001 - $60,000	6.0	4.2	7.3
$60,001 - $75,000	4.4	4.2	4.8
$75,001 - $90,000	1.9	1.4	2.2
> $90,000	1.6	0.7	2.2
	100.0	100.0	100.0
(#19) % COVERED BY (≠100)			
UIC	40.1	38.0	42.8
CPP	47.7	46.8	49.0
Workers Compensation	18.2	12.0	23.9
Medical Insurance	48.2	39.4	53.3
Disability Insurance	31.3	30.3	33.3
Life Insurance	34.8	33.5	35.3
Pension Plan/RRSP	32.6	38.4	31.0
None	20.4	21.5	19.0
(#19) % COVERED THROUGH ARTS	14.0	23.9	9.8
(#19) ETHNIC/CULTURAL GROUP (%) ≠100			
French	16.5	13.7	17.5
German	8.4	8.9	8.4
Italian	1.0	0.7	1.0
Ukranian	0.9	0.7	1.3
Dutch	2.3	2.4	2.3
Polish	1.0	1.0	1.0
N.A. Indian	0.4	0.3	0.6
Inuit/Eskimo	-	-	-
English	62.9	64.6	62.5
Scottish	32.8	31.6	34.3
Irish	17.6	17.9	16.8
Chinese	0.9	0.7	1.3
Jewish	2.4	2.4	2.6
Black	0.3	-	0.6
Metis	0.1	0.3	-
Other	11.3	13.7	9.4
(#20) % AFFILIATED WITH ORGANIZATION			
Yes	92.0	94.0	91.0
No	8.0	6.0	9.0
	100.0	100.0	100.0

	TOTAL N=670	FULL TIME N=301	PART TIME N=326
(#20) ORGANIZATIONS (%) ≠100			
. ACTRA	11.1	16.4	6.5
. Atlantic Federation of Musicians	22.3	26.7	19.5
. Atlantic Publishers Assoc.	1.4	2.1	1.0
. Dance Nova Scotia	4.5	4.3	4.4
. Canadian Actors Equity Assoc.	4.2	7.5	1.4
. Federation of N.S. Heritage	2.7	1.4	3.8
. IATSE	1.6	1.4	2.0
. Multicultural Assoc. of N.S.	1.1	0.4	2.0
. Music Industry Assoc. of N.S.	5.0	6.8	3.4
. N.S. Choral Federation	5.3	3.2	6.5
. N.S. Drama League	6.1	4.3	7.5
. N.S. Designer Crafts Council	7.8	10.3	6.5
. Professional Assoc. of Canadian Theatres	0.9	1.4	0.7
. Visual Arts N.S.	22.8	28.5	18.8
. Writers Federation of N.S.	23.1	17.1	27.6
. Other	46.3	51.2	42.7
(#21) MARKET POTENTIAL (%) ≠100			
. Halifax	47.4	46.9	47.7
. Nova Scotia	59.3	60.0	59.7
. Canada	57.8	72.4	44.8
. United States	38.4	46.2	31.6
. United Kingdom	7.5	9.0	6.8
. Europe	11.3	14.1	3.4
. Other	6.3	6.2	6.5
(#23) TRAINING NEEDED (%) ≠100			
. Art skills/techniques	54.2	50.0	58.1
. Business skills	43.3	48.6	41.0
. Advanced technology in discipline	38.6	46.2	32.5
. Other	13.4	12.9	15.4

COMMENTS AND OPINIONS

QUESTION #22	AGREE STRONGLY		NEUTRAL	DISAGREE STRONGLY	
	5	4	3	2	1
• The opportunity to do my own artistic cultural work is important to me.					
▸ Full-Time	85.0	10.0	4.7	4.7	-
▸ Part-Time	80.0	13.0	7.0	0.3	-
• There are few opportunities for me to advance my career in arts and culture in Nova Scotia.					
▸ Full-Time	20.0	27.0	28.0	15.0	10.0
▸ Part-Time	20.0	22.0	27.0	19.0	11.0
• I am frequently frustrated by the need to earn additional income through non-arts employment.					
▸ Full-Time	28.0	16.0	29.0	10.0	17.0
▸ Part-Time	20.0	16.0	25.0	19.0	20.0
• Given the choice I would choose to live and work in Nova Scotia.					
▸ Full-Time	56.0	19.0	14.0	6.1	5.1
▸ Part-Time	67.0	15.0	11.0	4.1	2.5
• My ability to earn income from arts and cultural activities would be enhanced by training.					
▸ Full-Time	14.0	28.0	32.0	13.0	13.0
▸ Part-Time	22.0	26.0	30.0	12.0	9.7
• I feel that I am part of a community that values arts and cultural activities.					
▸ Full-Time	22.0	24.0	20.0	20.0	14.0
▸ Part-Time	24.0	32.0	20.0	15.0	8.5

APPENDIX G

APPENDIX G

YEARS EARNING ARTS AND CULTURE INCOME

	TOTAL N=670	0 - 5 YEARS N=226	5 - 10 YEARS N=134	10 - 25 YEARS N=248	25+ YEARS N=59
(#1) MAIN ACTIVITIES (%)					
Literary Arts					
. Writing	21.3	31.5	20.2	14.7	17.2
. Editing	0.6	0.8	1.6	0.4	-
. Publishing	0.[illegible]	0.8	-	-	-
. Other	0.5	-	0.8	1.6	-
Visual Arts					
. Sculpture	1.4	0.8	1.6	1.3	3.5
. Painting	18.3	18.5	20.2	17.6	15.5
. Drawing	1.0	-	0.8	1.3	-
. Print-making	1.7	1.6	3.1	1.3	1.7
. Photography	1.3	0.8	1.6	2.1	-
. Other	2.1	2.4	3.1	2.0	-
Performing Arts					
. Music	26.2	20.2	20.9	29.8	39.7
. Dance	2.9	1.6	1.6	3.4	3.5
. Theatre	7.9	4.0	10.9	7.1	6.9
. Other	1.3	0.8	-	2.5	1.7
Crafts					
. Metal	0.5	0.8	-	0.8	-
. Wood	1.7	2.4	2.3	0.8	3.5
. Enamel	-	-	-	-	-
. Fibre	3.8	4.0	3.9	3.8	3.5
. Clay	1.4	-	1.6	2.5	-
. Other	1.3	1.6	1.5	1.7	-
Media Arts/Sound Recording					
. Film	1.6	3.2	2.3	0.8	1.7
. Video	0.8	1.6	-	0.8	1.7
. Sound Recording	1.0	-	0.8	1.7	-
. Other	0.2	-	0.8	-	-
Heritage					
. Historical Resources	0.8	2.4	-	0.4	-
. Other	-	-	-	-	-
Other					
-	0.3	-	-	0.8	-
	100.0	100.0	100.0	100.0	100.0

	TOTAL N=670	0 - 5 YEARS N=226	5 - 10 YEARS N=134	10 - 25 YEARS N=248	25+ YEARS N=59
(#1) SECONDARY ACTIVITIES (%)					
Literary Arts					
. Writing	20.7	14.9	23.0	23.1	24.4
. Editing	16.3	16.8	21.0	19.5	15.6
. Publishing	11.0	6.9	10.0	14.2	8.9
. Other	4.8	7.9	4.0	4.1	2.2
Visual Arts					
. Sculpture	8.9	10.9	7.0	10.7	6.7
. Painting	12.6	15.8	12.0	8.9	6.7
. Drawing	25.0	31.7	24.0	25.4	24.4
. Print-making	10.1	11.9	11.0	12.4	6.7
. Photography	14.7	18.8	12.0	15.4	11.1
. Other	8.7	8.9	7.0	11.2	2.2
Performing Arts					
. Music	14.3	11.9	12.0	13.6	15.6
. Dance	9.1	19.9	7.0	7.7	8.9
. Theatre	17.1	19.8	15.0	18.3	13.3
. Other	7.2	5.9	3.0	10.1	15.6
Crafts					
. Metal	3.5	6.9	6.0	0.6	2.2
. Wood	7.6	5.0	8.0	6.5	13.3
. Enamel	1.0	-	5.0	1.2	-
. Fibre	3.9	2.0	6.0	3.6	-
. Clay	3.1	5.9	3.0	1.2	2.2
. Other	5.0	5.9	3.0	4.7	6.7
Media Arts/Sound Recording					
. Film	9.7	10.9	12.0	8.9	6.7
. Video	11.0	12.9	12.0	10.7	6.7
. Sound Recording	9.9	12.9	4.0	11.8	8.9
. Other	1.7	1.0	-	2.4	6.7
Heritage					
. Historical Resources	3.7	4.0	4.0	5.3	4.4
. Other	1.7	1.0	-	-	2.2
Other					
-	2.3	2.0	1.0	2.4	4.4
(#1) MAIN DISCIPLINE IN 5 YEARS (%)					
Literary Arts					
. Writing	23.9	34.0	28.4	14.8	17.8
. Editing	0.2	1.0	-	-	-
. Publishing	0.2	-	-	0.5	-
. Other	0.6	1.0	-	1.5	-

	TOTAL N=676	0 - 5 YEARS N=226	5 - 10 YEARS N=134	10 - 25 YEARS N=248	25+ YEARS N=59
Visual Arts					
. Sculpture	1.3	1.0	1.0	1.0	4.4
. Painting	18.5	19.0	20.6	18.7	15.6
. Drawing	0.6	-	1.0	1.0	-
. Print-making	2.1	2.0	2.0	2.0	2.2
. Photography	1.1	1.0	1.0	2.0	-
. Other	2.7	2.0	5.0	3.4	-
Performing Arts					
. Music	22.9	16.0	15.7	28.1	28.9
. Dance	3.0	1.0	2.0	4.0	4.4
. Theatre	7.6	4.0	11.8	6.4	8.9
. Other	1.3	-	-	2.0	6.6
Crafts					
. Metal	0.2	-	-	0.5	-
. Wood	1.7	0.2	3.0	1.0	2.2
. Enamel	-	-	-	-	-
. Fibre	2.9	4.0	2.0	3.5	2.2
. Clay	1.9	1.0	2.0	2.5	2.2
. Other	0.8	1.0	-	1.5	-
Media Arts/Sound Rec.					
. Film	2.3	5.0	2.9	1.0	2.2
. Video	1.1	1.0	-	2.0	2.2
. Sound Recording	1.7	2.0	1.0	2.5	-
. Other	0.2	-	1.0	-	-
Heritage					
. Historical Resources	0.4	2.0	-	-	-
. Other	-	-	-	-	-
Other					
-	0.6	2.0	-	0.5	-
	100.0	100.0	100.0	100.0	100.0
(#2) PROFESSIONAL? (%)					
. Yes	73.0	65.0	84.0	89.0	81.0
. No	20.0	23.0	9.0	8.0	14.0
. Don't Know	7.0	11.0	7.0	3.0	5.0
	100.0	100.0	100.0	100.0	100.0

		TOTAL N=670	0 - 5 YEARS N=226	5 - 10 YEARS N=134	10 - 25 YEARS N=248	25+ YEARS N=59
(#3)	MAIN TYPE OF WORK - 1992 (%)					
.	Create	54.0	59.0	62.0	54.0	39.0
.	Director	3.0	2.4	2.3	1.3	8.9
.	Performer	23.0	20.0	18.0	25.0	36.0
.	Technician	2.0	1.6	3.1	3.0	-
.	Administration	4.0	5.5	3.8	4.3	5.4
.	Education	9.0	7.1	6.9	8.6	11.0
.	Other	5.0	4.7	3.8	3.9	-
		100.0	100.0	100.0	100.0	100.0
(#3)	SECONDARY TYPE OF WORK - 1992 (%) ≠100					
.	Create	25.9	25.0	27.0	24.0	26.0
.	Director	8.5	9.0	5.0	10.0	12.0
.	Performer	12.2	10.0	11.0	12.0	15.0
.	Technician	5.1	6.0	5.0	6.0	1.0
.	Administration	13.0	13.0	9.0	15.0	15.0
.	Education	29.9	33.0	38.0	27.0	27.0
.	Other	5.5	4.0	5.0	6.0	3.0
(#3)	MAIN TYPE OF WORK IN 5 YEARS (%)					
.	Create	59.0	60.0	68.0	60.0	52.0
.	Director	3.0	5.6	2.1	1.6	7.1
.	Performer	18.0	17.0	16.0	20.0	19.0
.	Technician	2.0	0.9	2.1	2.7	4.8
.	Administration	5.0	6.5	2.1	4.3	7.1
.	Education	9.0	7.4	7.3	8.5	7.1
.	Other	4.0	2.8	3.1	1.6	2.4
		100.0	100.0	100.0	100.0	100.0
(#4)	RECEIVED RECOGNITION? (%)					
.	Yes	86.0	85.0	87.0	91.0	97.0
.	No	14.0	15.0	13.0	9.0	3.0
		100.0	100.0	100.0	100.0	100.0

	TOTAL N=670	0 - 5 YEARS N=226	5 - 10 YEARS N=134	10 - 25 YEARS N=248	25+ YEARS N=59
(#4) RECOGNITION RECEIVED (%) ≠100					
. Reviews in Local Publications	81.1	71.3	83.6	85.0	87.5
. Reviews in Regional Publications	59.0	41.3	60.3	70.4	62.5
. Reviews in National Publications	37.0	17.4	34.5	49.1	48.2
. Reviews in International Publications	17.3	4.8	14.7	25.2	28.6
. Juried Exhibitions	38.0	33.5	42.2	42.0	30.4
. Awards	45.0	41.3	44.8	45.1	57.1
. Prizes	19.1	21.6	21.6	15.9	19.6
. Scholarships	10.0	13.8	13.8	7.1	7.1
. Other	8.1	10.8	7.8	7.1	5.4
(#5) YEAR ROUND EMPLOYMENT (%)	87.0	87.0	84.0	91.0	89.0
(#5) SEASONAL EMPLOYMENT (%)	13.0	13.0	16.0	9.0	11.0
	100.0	100.0	100.0	100.0	100.0
(#5) IF SEASONAL - AVERAGE WEEKS PER YEAR (No.)	25.1	24.3	24.4	31.4	21.8
(#5) IF SEASONAL - WHICH SEASONS? (%) ≠100					
. Summer	40.2	23.3	40.0	30.8	66.6
. Fall	65.9	40.0	70.0	76.9	33.3
. Winter	76.8	40.0	85.0	80.8	66.6
. Spring	61.0	30.0	55.0	76.9	50.0
(#6) FULL TIME EMPLOYMENT (%)	48.0	36.0	53.0	58.0	59.0
(#6) PART TIME EMPLOYMENT (%)	52.0	64.0	47.0	42.0	41.0
	100.0	100.0	100.0	100.0	100.0
(#6) IF PART TIME - AVERAGE HOURS PER WEEK (No.)	16.1	16.0	21.2	17.6	10.6

	TOTAL N=670	0 - 5 YEARS N=226	5 - 10 YEARS N=134	10 - 25 YEARS N=248	25+ YEARS N=59
(#7) EMPLOYMENT CATEGORY - MAIN (%)					
. Self-employed/free lance	68.3	55.0	71.0	78.0	70.0
. Owner of small business	3.3	2.9	7.5	2.1	-
. Member of family business	1.3	1.0	3.0	0.4	1.8
. Member of a co-op	0.9	1.9	0.8	-	1.8
. Salaried employee	11.4	7.2	11.0	13.0	23.0
. Hourly rated employee	2.3	2.9	3.0	2.1	-
. Other	3.6	6.7	1.5	2.5	1.8
. N/A	8.8	22.0	3.0	2.1	1.8
	100.0	100.0	100.0	100.0	100.0
(#7) EMPLOYMENT CATEGORY - SECONDARY (%) ≠100					
. Self-employed/free lance	81.8	74.2	87.3	85.8	90.0
. Owner of small business	9.7	8.1	4.8	12.8	13.3
. Member of family business	2.5	-	1.6	4.1	3.3
. Member of a co-op	6.9	11.3	11.1	4.7	-
. Salaried employee	8.5	8.1	14.3	8.8	3.3
. Hourly rated employee	12.9	14.5	15.9	13.5	3.3
. Other	5.7	6.5	3.2	5.4	6.7
. N/A	7.2	8.1	3.2	5.4	3.3
(#8) OWNER OF A SMALL ARTS AND CULTURE BUSINESS? (%)					
. Yes	18.0	14.0	20.0	24.0	17.0
. No	82.0	86.0	80.0	76.0	83.0
	100.0	100.0	100.0	100.0	100.0
(#9) % REPRESENTED BY:					
. Dealer	11.6	6.3	13.0	14.1	18.0
. Publisher	10.7	6.8	13.8	11.0	18.0
. Agent	11.8	5.8	12.2	15.4	18.0
. Marketing Organization	2.6	2.6	3.3	2.6	2.0
. Co-op	4.7	5.2	5.7	4.4	2.0
. Other	13.3	12.6	11.4	15.4	12.0
. None of the Above	55.8	68.6	52.8	49.8	44.0

	TOTAL N=670	0 - 5 YEARS N=226	5 - 10 YEARS N=134	10 - 25 YEARS N=248	25+ YEARS N=59
(#10) ARTS AND CULTURE INCOME - 1992 (%)					
. 100%	29.7	13.6	29.3	40.7	42.1
. 90-99%	2.5	1.5	1.5	4.5	-
. 80-89%	2.8	1.5	3.8	3.3	3.5
. 70-79%	2.5	2.9	3.0	2.1	1.8
. 60-69%	2.5	1.0	4.5	3.3	-
. 50-59%	4.1	1.5	6.0	4.9	5.3
. 40-49%	1.9	1.0	5.3	1.2	-
. 30-39%	2.5	2.4	3.8	2.1	1.8
. 20-29%	8.3	6.3	6.8	10.7	8.8
. 10-19%	7.2	7.3	8.3	7.8	1.8
. 1-9%	23.8	28.2	26.3	16.5	33.3
. 0%	12.2	33.0	1.5	2.9	1.8
	100.0	100.0	100.0	100.0	100.0
(#10) ARTS AND CULTURE INCOME - 5 YEARS AGO (%)					
. 100%	26.8	1.8	25.2	40.7	47.3
. 90-99%	3.1	1.8	2.4	4.7	1.8
. 80-89%	2.4	0.6	1.6	4.2	1.8
. 70-79%	1.7	-	1.6	3.4	-
. 60-69%	2.6	0.6	3.9	3.4	1.8
. 50-59%	3.4	1.8	4.7	4.7	1.8
. 40-49%	1.2	-	0.8	1.7	3.6
. 30-39%	3.8	-	7.9	5.1	-
. 20-29%	5.0	1.8	8.7	5.1	5.5
. 10-19%	9.4	6.0	15.0	8.9	9.1
. 1-9%	19.5	18.0	23.6	16.5	27.3
. 0%	21.0	67.7	4.7	1.7	-
	100.0	100.0	100.0	100.0	100.0
(#10) ARTS AND CULTURE INCOME - 5 YEARS FROM NOW (%)					
. 100%	36.5	19.8	38.5	46.3	45.7
. 90-99%	5.3	4.7	6.0	6.6	-
. 80-89%	3.9	4.7	5.1	3.5	-
. 70-79%	4.1	4.1	6.0	4.0	-
. 60-69%	2.5	2.3	2.6	2.2	4.4
. 50-59%	5.5	6.4	9.4	3.5	2.2
. 40-49%	2.7	4.1	0.9	3.1	-
. 30-39%	3.4	3.5	1.7	4.4	2.2
. 20-29%	8.2	10.5	6.0	7.1	10.9
. 10-19%	7.8	9.9	6.8	6.2	10.9
. 1-9%	12.1	11.2	14.5	9.7	17.4
. 0%	7.8	18.2	2.6	3.5	6.5
	100.0	100.0	100.0	100.0	100.0

	TOTAL N=670	0 - 5 YEARS N=226	5 - 10 YEARS N=134	10 - 25 YEARS N=248	25+ YEARS N=59
(#11) AVERAGE YEARS EARNING ARTS AND CULTURE INCOME (No.)	13.5	2.8	8.5	16.8	34.3
(#12) WAYS ARTS AND CULTURE INCOME IS RECEIVED (%) ≠100					
. Commissions	27.3	17.6	29.1	35.4	23.7
. Royalties	20.9	12.7	22.4	25.6	27.1
. Copyrights	7.1	3.9	9.0	7.3	13.6
. Fees	41.1	19.6	51.5	49.6	57.6
. Sales	39.2	32.8	44.8	45.1	25.4
. Salaries	21.5	9.3	21.6	28.5	35.6
. Wages	19.2	13.2	28.4	21.1	11.9
. Grants	14.7	9.3	18.7	19.1	6.8
. Awards	8.6	9.3	10.4	7.7	6.8
. Tax Receipts	5.5	3.4	11.9	5.3	-
. Other	11.6	14.7	11.9	8.5	13.6
. N/A	7.2	22.1	0.7	0.4	-
(#12) MOST FINANCIALLY REWARDING WAY (%)					
. Commissions	9.8	12.5	5.0	13.1	-
. Royalties	6.7	8.7	6.9	4.0	13.5
. Copyrights	-	-	-	-	-
. Fees	16.3	9.6	12.9	19.3	29.7
. Sales	26.3	29.8	28.7	26.1	10.8
. Salaries	17.7	10.6	15.8	20.0	32.4
. Wages	11.7	10.6	17.8	10.2	5.4
. Grants	1.0	-	3.0	0.6	-
. Awards	1.7	2.9	1.0	1.1	2.7
. Tax Receipts	0.2	1.0	-	-	-
. Other	7.2	10.6	7.9	5.1	5.4
. N/A	1.2	3.9	-.	0.6	-.
	100.0	100.0	100.0	100.0	100.0
(#13) MARKET - % SELECTING ≠100					
. N.S. Residents	98.4	98.9	98.3	98.3	98.3
. N.S. Tourists/Visitors	66.1	56.3	72.8	72.5	73.5
. Canada	58.3	48.9	64.2	63.9	64.8
. United States	33.7	29.5	37.1	37.0	37.5
. Other	23.2	18.2	25.5	25.4	25.8

	TOTAL N=670	0 - 5 YEARS N=226	5 - 10 YEARS N=134	10 - 25 YEARS N=248	25+ YEARS N=59
(#14) WHERE WORK IS CREATED (%) ≠100					
. Own residence	82.0	81.0	79.5	86.0	76.8
. Purpose-designed facility	36.0	22.9	44.7	44.6	37.5
. Community spaces	27.0	27.1	28.0	25.6	32.1
. Vacant commercial	3.0	1.4	4.5	4.1	-
. Shared use	10.0	8.6	9.1	13.2	5.4
. Other	8.0	9.0	7.6	5.8	16.1
(#14) WHERE WORK IS CREATED MOST OFTEN (%)					
. Own residence	67.0	73.0	63.0	67.0	58.0
. Purpose-designed facility	19.0	12.0	29.0	20.0	18.0
. Community spaces	6.1	8.0	3.2	5.1	10.0
. Vacant commercial	1.0	-	1.6	1.9	-
. Shared use	2.4	2.7	0.8	2.8	4.0
. Other	4.3	4.8	2.4	3.7	10.0
	100.0	100.0	100.0	100.0	100.0
(#15) WHERE WORK IS PRESENTED (%) ≠100					
. Own/other residence	31.0	27.2	34.6	33.1	32.8
. Purpose-designed facility	54.0	29.6	54.6	67.8	44.8
. Community spaces	46.0	16.0	43.1	48.8	41.4
. Vacant commercial	2.7	1.9	4.6	2.9	-
. Shared use	16.0	22.3	17.7	14.0	19.0
. Other	19.0	16.5	23.8	21.5	10.3
. N/A	12.0	18.4	10.8	7.9	13.8
(#15) WHERE PRESENTED MOST OFTEN (%)					
. Own/other residence	16.0	14.0	19.0	13.5	23.0
. Purpose-designed facility	37.0	29.0	36.0	47.0	26.0
. Community spaces	19.0	24.0	16.0	13.5	28.0
. Vacant commercial	1.0	0.6	2.7	0.5	-
. Shared use	4.7	6.9	1.8	4.0	7.0
. Other	15.0	14.0	16.0	15.5	9.3
. N/A	8.2	11.0	8.9	6.0	7.0
	100.0	100.0	100.0	100.0	100.0
(#16) AVERAGE ARTS AND CULTURE EXPENDITURE ($)	$12,555.00	$3,983.00	$13,575.00	$13,891.00	$38,638.00

	TOTAL N=670	0 - 5 YEARS N=226	5 - 10 YEARS N=134	10 - 25 YEARS N=248	25+ YEARS N=59
(#17) % OF EXPENDITURES					
. Supplies	25.2	28.1	38.7	24.0	26.0
. Travel	19.2	17.7	13.9	20.0	21.0
. Equipment	17.9	18.6	19.4	18.0	18.0
. Training	6.5	10.0	3.8	4.0	6.0
. Staff	3.0	2.5	4.7	3.0	4.0
. Sales/Commissions	4.1	3.2	2.9	4.0	6.0
. Advertising/Marketing	8.8	7.0	3.5	11.0	8.0
. Rent - Work	6.1	4.8	5.6	6.0	3.0
. Rent - Perform	3.1	2.0	1.6	3.0	4.0
. Other	5.9	5.9	6.0	7.0	4.0
	100.0	100.0	100.0	100.0	100.0
(#17) % EXPENDITURES WITHIN NOVA SCOTIA	83.4	85.0	82.4	83.4	79.0
(#18) GENERATE NON ARTS AND CULTURE INCOME? (%)					
. Yes	73.3	78.0	72.0	65.0	72.0
. No	26.7	22.0	28.0	35.0	28.0
	100.0	100.0	100.0	100.0	100.0
(#18) IF YES, HOW? (%) ≠100					
. Owner of non-arts business	7.0	10.0	10.4	7.9	14.3
. Non-arts professional employment	19.6	31.7	24.0	28.0	14.3
. Support from family	13.2	20.0	18.8	19.5	7.1
. Government employee	9.7	13.9	14.6	14.6	4.8
. Skilled trade	5.1	6.1	8.3	7.9	4.8
. Retail/service	5.1	6.1	13.5	4.3	7.1
. Manufacturing	1.2	2.2	1.0	1.2	2.4
. Resource Sector	1.0	2.8	-	1.2	-
. Farmer	1.5	3.9	-	1.2	2.4
. UIC	10.4	15.0	15.6	15.9	4.8
. Pension Plan	13.7	17.8	15.6	17.1	40.5
. Other	12.5	15.0	17.7	15.9	33.3

	TOTAL N=670	0 - 5 YEARS N=226	5 - 10 YEARS N=134	10 - 25 YEARS N=248	25+ YEARS N=59
(#18) MOST FINANCIALLY REWARDING (%)					
Owner of non-arts business	6.7	3.7	8.5	8.2	9.5
Non-arts professional employment	24.4	32.1	16.9	21.8	19.0
Support from family	7.0	8.3	8.5	5.5	4.8
Government employee	13.0	13.8	13.6	13.6	4.8
Skilled trade	4.4	3.7	3.4	5.5	4.8
Retail/service	5.4	6.4	11.9	1.0	4.8
Manufacturing	0.7	1.0	-	1.0	-
Resource Sector	1.0	1.8	-	1.0	-
Farmer	1.7	3.7	-	1.0	-
UIC	8.0	4.6	11.9	10.9	-
Pension Plan	16.4	15.6	10.2	17.3	33.3
Other	11.4	5.5	15.3	13.6	19.0
	100.0	100.0	100.0	100.0	100.0
(#19) GENDER (%)					
Male	50.0	41.0	44.0	57.0	66.0
Female	50.0	59.0	56.0	43.0	34.0
	100.0	100.0	100.0	100.0	100.0
(#19) AGE (%)					
< 25 years	4.7	12.0	2.3	-	-
25-34 years	17.0	21.0	34.0	8.9	-
35-44 years	34.0	27.0	32.0	49.0	5.2
45-54 years	23.0	16.0	18.0	28.0	36.0
55-64 years	12.0	13.0	8.4	8.1	31.0
65+ years	9.4	10.0	5.3	6.5	28.0
	100.0	100.0	100.0	100.0	100.0
(#19) AVERAGE YEARS IN NOVA SCOTIA (No.)	26.9	26.9	23.3	27.1	35.2

	TOTAL N=670	0 - 5 YEARS N=226	5 - 10 YEARS N=134	10 - 25 YEARS N=248	25+ YEARS N=59
(#19) COUNTY OF RESIDENCE (%)					
. Annapolis	3.5	2.7	3.8	4.6	1.8
. Antigonish	2.3	2.2	3.8	2.1	-
. Cape Breton	7.5	6.7	6.1	8.7	8.9
. Colchester	3.2	4.4	3.8	2.5	-
. Cumberland	0.6	1.3	-	0.4	-
. Digby	1.7	2.7	0.8	1.2	1.8
. Guysborough	0.3	-	1.5	-	-
. Halifax	57.4	51.6	58.8	61.4	60.7
. Hants	1.8	1.8	2.3	1.2	3.6
. Inverness	3.1	5.3	1.5	1.7	3.6
. Kings	5.2	6.7	3.8	4.6	5.4
. Lunenburg	4.9	3.6	6.9	4.6	7.1
. Pictou	2.1	4.0	2.3	0.8	-
. Queens	0.8	1.8	-	0.4	-
. Richmond	0.8	0.9	0.8	0.8	-
. Shelburne	0.6	0.4	-	0.8	1.8
. Victoria	1.5	0.9	1.5	2.5	-
. Yarmouth	2.6	3.1	2.3	1.7	5.4
	100.0	100.0	100.0	100.0	100.0
(#19) FORMAL EDUCATION (%)					
. University graduate	32.0	30.0	31.0	33.0	35.0
. University undergraduate	31.0	28.0	34.0	34.0	16.0
. College	21.0	23.0	22.0	19.0	21.0
. High School	14.0	15.0	9.8	12.0	25.0
. Elementary School	2.3	3.1	3.0	1.2	3.5
	100.0	100.0	100.0	100.0	100.0
(#19) OTHER FORMS OF TRAINING ≠100					
. Workshops	79.0	86.0	76.8	77.3	73.5
. Apprenticeship	25.0	17.4	33.6	26.2	32.7
. Self-taught	72.0	66.2	80.8	73.4	71.4
. Other	17.0	19.3	12.0	18.0	22.4
(#19) 1991 TOTAL INCOME (%)					
. < $15,000	31.7	35.2	40.3	26.6	18.9
. $15,001 - $20,000	12.4	12.5	16.3	11.8	5.7
. $20,001 - $25,000	10.2	11.6	7.8	11.8	3.8
. $25,001 - $30,000	7.7	4.2	12.4	8.4	7.6
. $30,001 - $35,000	7.6	7.9	6.2	8.0	7.6
. $35,001 - $40,000	7.1	6.9	3.9	8.9	7.6
. $40,001 - $45,000	4.4	4.2	3.9	5.9	-
. $45,001 - $50,000	5.0	4.6	1.6	4.6	17.0
. $50,001 - $60,000	6.0	6.0	1.6	7.6	9.4
. $60,001 - $75,000	4.4	3.2	1.6	4.2	17.0
. $75,001 - $90,000	1.9	3.2	0.8	1.3	1.9
. > $90,000	1.6	0.5	3.9	0.8	3.8
	100.0	100.0	100.0	100.0	100.0

	TOTAL N=670	0 - 5 YEARS N=226	5 - 10 YEARS N=134	10 - 25 YEARS N=248	25+ YEARS N=59
(#19) % COVERED BY: ≠100					
· UIC	40.1	40.9	43.0	40.2	30.4
· CPP	47.7	41.8	44.5	55.1	46.4
· Workers Compensation	18.2	18.3	14.8	20.5	16.1
· Medical Insurance	48.2	51.0	39.8	46.6	64.3
· Disability Insurance	31.3	31.7	25.8	34.2	30.4
· Life Insurance	34.8	33.2	35.9	34.6	39.3
· Pension Plan/RRSP	32.6	30.3	29.7	33.8	42.9
· None	20.4	23.1	19.5	17.5	25.0
(#19) % COVERED THROUGH ARTS	14.0	8.7	14.2	16.4	14.4
(#19) ETHNIC/CULTURAL GROUP (%) ≠100					
· French	16.5	21.8	14.8	13.0	14.5
· German	8.4	9.1	6.3	9.2	7.3
· Italian	1.0	0.9	2.3	0.8	-
· Ukranian	0.9	1.4	0.8	0.8	-
· Dutch	2.3	2.3	3.9	1.3	3.6
· Polish	1.0	1.4	1.6	0.8	-
· N.A. Indian	0.4	0.5	-	0.4	1.8
· Inuit/Eskimo	-	-	-	-	-
· English	62.9	58.2	64.1	66.9	63.6
· Scottish	32.8	35.5	35.9	31.0	23.6
· Irish	17.6	19.5	16.4	16.7	16.4
· Chinese	0.9	1.8	-	0.8	-
· Jewish	2.4	1.8	2.3	3.8	-
· Black	0.3	0.5	-	-	1.8
· Metis	0.1	-	-	0.4	-
· Other	11.3	12.3	13.3	10.0	9.1
(#20) % AFFILIATED WITH ORGANIZATION					
· Yes	92.0	90.0	92.0	94.0	93.0
· No	8.0	10.0	8.0	6.0	7.0
	100.0	100.0	100.0	100.0	100.0

	TOTAL N=678	0 - 5 YEARS N=226	5 - 10 YEARS N=134	10 - 25 YEARS N=248	25+ YEARS N=59
(#20) ORGANIZATIONS (%) ≠100					
. ACTRA	11.1	5.5	19.0	12.2	22.6
. Atlantic Federation of Musicians	22.3	14.0	27.4	28.3	35.8
. Atlantic Publishers Assoc.	1.4	-	3.6	2.5	-
. Dance Nova Scotia	4.5	6.0	6.0	3.4	5.7
. Canadian Actors Equity Assoc.	4.2	0.5	9.5	5.1	9.4
. Federation of N.S. Heritage	2.7	3.5	2.4	3.4	-
. IATSE	1.6	-	3.6	3.0	-
. Multicultural Assoc. of N.S.	1.1	2.5	1.2	0.4	-
. Music Industry Assoc. of N.S.	5.0	4.0	11.9	5.1	1.9
. N.S. Choral Federation	5.3	8.0	1.2	4.6	9.4
. N.S. Drama League	6.1	8.0	11.9	3.4	7.5
. N.S. Designer Crafts Council	7.8	4.0	16.7	10.1	3.8
. Professional Assoc. of Canadian Theatres	0.9	-	3.6	1.3	-
. Visual Arts N.S.	22.8	17.0	40.5	26.2	18.9
. Writers Federation of N.S.	23.1	30.0	33.3	19.0	17.0
. Other	46.3	42.0	71.4	46.8	54.7
(#21) MARKET POTENTIAL (%) ≠100					
. Halifax	47.4	43.1	47.3	51.5	47.4
. Nova Scotia	59.3	54.5	58.9	59.4	63.2
. Canada	57.8	48.8	62.0	63.6	57.9
. United States	38.4	34.0	40.3	40.6	42.1
. United Kingdom	7.5	6.7	9.3	8.4	3.5
. Europe	11.3	6.7	10.1	17.6	5.3
. Other	6.3	5.7	4.7	8.4	3.5
(#23) TRAINING NEEDED (%) ≠100					
. Art skills/techniques	54.2	59.6	56.4	51.7	35.3
. Business skills	43.3	36.1	47.9	47.7	44.1
. Advanced technology in discipline	38.6	28.9	43.6	46.6	32.4
. Other	13.4	18.1	10.0	9.8	26.5

	TOTAL N=187	FOR PROFIT COMPANY N=33	PROFESSIONAL NOT FOR PROFIT N=44	AMATEUR NOT FOR PROFIT ORGANIZATION N=62	SERVICE ORGANIZATION N=42
(#24) EXPENDITURES (%)					
. Salaries, Wages, Benefits	38.8	17.5	57.4	30.4	47.2
. Supplies	21.5	40.0	8.0	14.9	7.4
. Equipment	5.1	7.2	2.7	16.4	4.0
. Sales/Commissions	6.6	13.6	0.6	1.8	6.1
. Rent	2.8	1.5	2.8	7.8	6.1
. Travel	3.3	3.1	2.9	7.2	4.2
. Advertising/Marketing	5.7	5.4	6.6	4.2	3.8
. Training	0.7	0.3	0.5	5.4	2.0
. Other	15.5	11.4	18.6	11.7	19.2
	100.0	100.0	100.0	100.0	100.0
(#24) % EXPENDITURES WITHIN NOVA SCOTIA	87.7	74.2	88.6	88.9	95.4
(#25) OPERATING REVENUES (Ave.)%					
. Sales of Product/Service	39.3	72.6	35.1	23.2	10.0
. Private Sector Fundraising/Donations	10.2	4.1	10.8	22.2	14.6
. Other Self Generated Revenue	8.4	1.7	7.2	31.8	16.8
. Municipal/County Grants	2.4	0.6	1.4	2.7	5.6
. Provincial Grants	19.4	11.7	17.5	18.0	35.9
. Federal Grants	20.2	8.9	27.6	1.8	16.9
	100.0	100.0	100.0	100.0	100.0

* Situations where total results appear to be inconsistent with organization results are due to 6 respondents who did not select an organization type; their results are included in total results, but did not appear under any organization type.

COMMENTS AND OPINIONS

QUESTION #22	AGREE STRONGLY 5	4	NEUTRAL 3	2	DISAGREE STRONGLY 1
• The opportunity to do my own artistic cultural work is important to me.					
▸ 0 - 5 Years	82.0	14.0	3.8	-	-
▸ 5 - 10 Years	83.0	12.0	4.5	0.8	-
▸ 10 - 25 Years	85.0	9.4	6.6	-	-
▸ 25+ Years	78.0	13.0	9.1	-	-
• There are few opportunities for me to advance my career in arts and culture in Nova Scotia.					
▸ 0 - 5 Years	24.0	25.0	25.0	18.0	7.6
▸ 5 - 10 Years	31.0	26.0	26.0	11.0	13.0
▸ 10 - 25 Years	18.0	27.0	27.0	20.0	11.0
▸ 25+ Years	27.0	16.0	16.0	22.0	7.3
• I am frequently frustrated by the need to earn additional income through non-arts employment.					
▸ 0 - 5 Years	40.0	23.0	22.0	7.8	7.0
▸ 5 - 10 Years	31.0	15.0	11.0	8.7	13.0
▸ 10 - 25 Years	25.0	13.0	30.0	12.0	4.5
▸ 25+ Years	24.0	14.0	22.0	7.8	33.0
• Given the choice again I would choose to live and work in Nova Scotia.					
▸ 0 - 5 Years	61.0	11.0	17.0	6.8	3.0
▸ 5 - 10 Years	60.0	20.0	11.0	5.3	3.1
▸ 10 - 25 Years	56.0	21.0	15.0	3.7	4.5
▸ 25+ Years	68.0	18.0	1.8	7.1	5.4
• My ability to earn income from arts and cultural activities would be enhanced by training.					
▸ 0 - 5 Years	26.0	29.0	25.0	9.9	9.9
▸ 5 - 10 Years	16.0	31.0	32.0	12.0	9.3
▸ 10 - 25 Years	12.0	24.0	34.0	17.0	12.0
▸ 25+ Years	10.0	32.0	30.0	12.0	16.0
• I feel that I am part of a community that values art and cultural activities.					
▸ 0 - 5 Years	26.0	22.0	21.0	18.0	13.0
▸ 5 - 10 Years	22.0	24.0	21.0	18.0	15.0
▸ 10 - 25 Years	21.0	28.0	19.0	21.0	11.0
▸ 25+ Years	20.0	39.0	16.0	14.0	11.0

APPENDIX H

APPENDIX H
ORGANIZATION SURVEY RESULTS BY ORGANIZATION TYPE

	TOTAL N=187	FOR PROFIT COMPANY N=33	PROFESSIONAL NOT FOR PROFIT N=44	AMATEUR NOT FOR PROFIT ORGANIZATION N=62	SERVICE ORGANIZATION N=42
(#3) MAIN DISCIPLINE - 1992 (%)					
Literary Arts					
. Writing	1.2	-	2.6	-	-
. Editing	-	-	-	-	-
. Publishing	1.8	4.0	5.3	-	-
. Other	5.5	4.0	-	5.1	12.8
Visual Arts					
. Sculpture	0.6	-	-	-	-
. Painting	8.5	12.0	10.5	8.5	5.1
. Drawing	-	-	-	-	-
. Print-making	-	-	-	-	-
. Photography	0.6	-	-	1.7	-
. Other	3.1	16.0	2.6	-	-
Performing Arts					
. Music	25.6	12.0	18.4	45.8	10.3
. Dance	2.4	-	2.6	3.4	2.6
. Theatre	7.9	-	26.3	5.1	-
. Other	1.2	4.0	-	-	2.6
Crafts					
. Metal	1.2	8.0	-	-	-
. Wood	2.4	8.0	-	3.4	-
. Enamel	-	-	-	-	-
. Fibre	4.9	12.0	-	6.8	2.6
. Clay	1.2	8.0	-	-	-
. Other	3.1	-	-	3.4	7.7
Media Arts/Sound Recording					
. Film	2.4	8.0	-	-	5.1
. Video	0.6	-	-	-	2.6
. Sound Recording	1.2	-	-	1.7	2.6
. Other	-	-	-	-	-
Heritage					
. Historical Resources Excluding government	16.5	-	23.7	10.2	30.8
. Other	3.7	4.0	2.6	1.7	7.7
Other	4.3	-	5.3	3.4	7.7
	100.0	100.0	100.0	100.0	100.0

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	TOTAL N=187	FOR PROFIT COMPANY N=33	PROFESSIONAL NOT FOR PROFIT N=44	AMATEUR NOT FOR PROFIT ORGANIZATION N=62	SERVICE ORGANIZATION N=42
(#3) SECONDARY ACTIVITIES (%)=100					
Literary Arts					
. Writing	5.3	9.1	6.8	3.2	4.8
. Editing	2.7	-	4.5	1.6	2.4
. Publishing	2.7	3.0	2.3	1.6	4.8
. Other	3.2	3.0	2.3	4.8	2.4
Visual Arts					
. Sculpture	5.3	15.2	2.3	4.8	2.4
. Painting	2.1	6.1	2.3	1.6	-.
. Drawing	4.8	12.1	2.3	4.8	2.4
. Print-making	4.3	9.1	4.5	4.8	2.4
. Photography	2.7	3.0	2.3	3.2	2.4
. Other	1.1	-	-	-	4.8
Performing Arts					
. Music	5.3	3.0	6.8	8.1	2.4
. Dance	2.7	-	2.3	3.2	2.4
. Theatre	5.3	3.0	6.8	8.1	2.4
. Other	5.3	6.1	4.5	3.2	7.1
Crafts					
. Metal	1.6	9.1	-	-	-
. Wood	0.5	3.0	-	-	-
. Enamel	0.5	-	-	1.6	-
. Fibre	0.5	3.0	-	1.6	-
. Clay	1.1	9.1	-	1.6	-
. Other	2.1	3.0	2.3	1.6	2.4
Media Arts/Sound Recording					
. Film	1.6	6.1	2.3	-	2.4
. Video	3.2	3.0	-	1.6	9.5
. Sound recording	1.1	3.0	-	-	2.4
. Other	0.5	-	-	1.6	-
Heritage					
. Historical resources	4.8	-	4.5	6.5	4.8
. Other	4.8	-	4.5	3.2	11.9
Other	4.3	-	6.8	3.2	7.1
(#3) MAIN DISCIPLINE IN 5 YEARS (%)					
Literary Arts					
. Writing	0.8	-	-	-	-
. Editing	-	-	-	-	-
. Publishing	3.3	-	10.3	-	-
. Other	5.7	5.6	-	6.6	10.7

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	TOTAL N=187	FOR PROFIT COMPANY N=33	PROFESSIONAL NOT FOR PROFIT N=44	AMATEUR NOT FOR PROFIT ORGANIZATION N=62	SERVICE ORGANIZATION N=42
Visual Arts					
. Sculpture	0.8	-	3.4	-	-
. Painting	7.3	16.7	6.9	6.6	3.6
. Drawing	-	-	-	-	-
. Print-making	-	-	-	-	-
. Photography	0.8	-	-	2.2	-
. Other	3.3	16.7	3.4	-	-
Performing Arts					
. Music	25.2	11.1	17.2	46.7	10.7
. Dance	3.3	-	3.4	4.4	3.6
. Theatre	8.9	-	27.6	6.7	-
. Other	0.8	-	-	-	3.6
Crafts					
. Metal	1.6	11.1	-	-	-
. Wood	1.6	5.6	-	2.2	-
. Enamel	-	-	-	-	-
. Fibre	3.3	5.6	-	4.4	3.6
. Clay	1.6	11.1	-	-	-
. Other	2.4	-	-	4.4	7.1
Media Arts/Sound Recording					
. Film	2.4	11.1	-	-	3.6
. Video	0.8	-	-	-	3.6
. Sound recording	0.8	-	-	-	3.6
. Other	0.8	-	-	2.2	-
Heritage					
. Historical resources	14.6	-	20.7	8.9	28.6
. Other	4.9	5.6	3.4	2.2	7.1
Other	4.9	-	3.4	4.4	10.7
	100.0	100.0	100.0	100.0	100.0
(#4) Year Founded (Ave.)	1973	1979	1974	1971	1972
(#5) Governed by a Board of Directors/Trustees? (%)					
. Yes	66.0	19.4	81.4	66.7	83.3
. No	34.0	80.6	18.6	33.3	16.7
	100.0	100.0	100.0	100.0	100.0

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	TOTAL N=187	FOR PROFIT COMPANY N=33	PROFESSIONAL NOT FOR PROFIT N=44	AMATEUR NOT FOR PROFIT ORGANIZATION N=62	SERVICE ORGANIZATION N=42
(#6) GEOGRAPHIC BASE (%)					
· International	22.0	65.6	22.0	10.0	7.1
· National	8.0	15.6	7.3	3.3	9.5
· Atlantic Region	15.0	9.4	19.5	11.7	14.3
· Provincial	24.0	3.1	34.1	23.3	31.0
· County	15.0	-	7.3	30.0	14.3
· Community	17.0	6.3	9.8	21.7	23.8
	100.0	100.0	100.0	100.0	100.0
(#7) HEADQUARTER COUNTY (%)					
· Annapolis	2.0	9.1	-	1.6	-
· Antigonish	4.0	3.0	2.3	4.9	4.8
· Cape Breton	5.0	-	9.1	4.9	7.1
· Colchester	4.0	3.0	2.3	6.6	4.8
· Cumberland	4.0	6.1	2.3	6.6	2.4
· Digby	6.0	6.1	2.3	6.6	7.1
· Guysborough	2.0	-	4.5	1.6	-
· Halifax	44.0	39.4	56.8	31.1	50.0
· Hants	2.0	-	2.3	4.9	-
· Inverness	3.0	9.1	-	1.6	4.8
· Kings	4.0	3.0	-	3.3	9.5
· Lunenburg	7.0	6.1	6.8	9.8	4.8
· Pictou	4.0	3.0	2.3	8.2	-
· Queens	-	-	-	-	-
· Richmond	-	-	-	-	-
· Shelburne	3.0	-	-	4.9	2.4
· Victoria	3.0	12.1	-	1.6	2.4
· Yarmouth	3.0	-	9.1	1.6	-
	100.0	100.0	100.0	100.0	100.0
(#8) EMPLOYEES (Ave. No.)					
Current					
· Full-Time Year Round	1.17	1.94	2.38	.20	.68
· Part-Time Year Round	.47	.71	.65	.14	.57
· Full-Time Seasonal	1.50	.42	4.74	.22	.95
· Part-Time Seasonal	.84	.42	1.92	.51	.57
· Contract	3.04	2.97	7.16	.20	2.92
	7.02	6.46	16.85	1.27	5.69
5 Years Ago					
· Full-Time Year Round	1.14	2.26	2.42	.13	.58
· Part-Time Year Round	.30	.37	.47	.06	.44
· Full-Time Seasonal	1.26	.26	3.82	.17	.78
· Part-Time Seasonal	.57	.37	1.29	.29	.34
· Contract	2.80	5.53	6.15	.15	1.63
	6.07	8.79	14.20	.80	3.77
5 Years From Now					
· Full-Time Year Round	2.34	3.41	3.20	.45	3.34
· Part-Time Year Round	.40	.67	.40	.13	.56
· Full-Time Seasonal	1.70	.63	5.10	.30	1.50
· Part-Time Seasonal	.78	.56	1.87	.45	.44
· Contract	3.17	2.59	10.70	.23	1.03
	8.39	7.86	21.27	1.56	6.87

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	TOTAL N=187	FOR PROFIT COMPANY N=33	PROFESSIONAL NOT FOR PROFIT N=44	AMATEUR NOT FOR PROFIT ORGANIZATION N=62	SERVICE ORGANIZATION N=42
Current % *100 Female					
. Full-Time Year Round	59.0	61.4	61.1	50.0	66.7
. Part-Time Year Round	47.0	51.9	35.7	19.0	52.6
. Full-Time Seasonal	46.0	39.0	43.2	95.0	62.9
. Part-Time Seasonal	60.0	27.8	56.3	76.2	86.7
. Contract	34.0	62.5	27.5	70.0	28.8
Current % *100 Visible Minority					
. Full-Time Year Round	8.2	2.4	6.3	-	7.4
. Part-Time Year Round	1.0	3.7	-	-	-
. Full-Time Seasonal	4.0	1.7	5.1	15.0	-
. Part-Time Seasonal	7.0	5.6	8.8	-	6.7
. Contract	10.0	41.7	1.7	-	7.4
Current % *100 Under 25 Years					
. Full-Time Year Round	6.3	1.5	5.3	-	-
. Part-Time Year Round	12.0	14.8	14.3	4.8	-
. Full-Time Seasonal	18.0	13.6	14.2	45.0	34.3
. Part-Time Seasonal	39.0	55.6	41.3	-	46.7
. Contract	11.0	14.6	11.6	20.0	8.1
Current % *100 Over 50 Years Old					
. Full-Time Year Round	26.0	2.7	36.8	25.0	25.9
. Part-Time Year Round	5.0	11.1	-	-	5.3
. Full-Time Seasonal	6.0	1.7	7.4	10.0	8.6
. Part-Time Seasonal	18.0	11.1	5.0	76.2	13.3
. Contract	11.0	24.0	5.0	30.0	12.9
(#9) MINIMUM EDUCATION/ EXPERIENCE REQUIREMENTS? (%)					
. Yes	53.0	37.5	60.0	47.2	69.7
. No	47.0	62.5	40.0	52.8	30.3
	100.0	100.0	100.0	100.0	100.0
(#9) IF YES, MANAGEMENT REQUIREMENTS (%) * 100					
. High School Completion	15.4	33.3	12.5	11.8	13.0
. Some University	21.8	25.0	29.2	11.8	21.7
. University Graduation	37.2	41.7	41.7	17.6	39.1
. Workshops/Courses	19.2	25.0	25.0	17.6	13.0
. Technical Studies Specific to Discipline	15.4	8.3	12.5	17.6	13.0
. Apprenticeship with Peer/Mentor	9.0	8.3	12.5	5.9	4.3
. Professional Designation	5.1	-	4.2	5.9	8.7
. Other	15.4	16.7	20.8	11.8	8.7

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	TOTAL N=187	FOR PROFIT COMPANY N=33	PROFESSIONAL NOT FOR PROFIT N=44	AMATEUR NOT FOR PROFIT ORGANIZATION N=62	SERVICE ORGANIZATION N=42
(#9) PERFORMER/ARTIST REQUIREMENTS (%) ≠100					
. High School Completion	3.8	16.7	4.2	-	-
. Some University	1.3	-	-	-	4.3
. University Graduation	3.8	8.3	4.2	5.9	-
. Workshops/Courses	9.0	8.3	8.3	17.6	-
. Technical Studies Specific to Discipline	10.3	8.3	8.3	23.5	4.3
. Apprenticeship with Peer/Mentor	9.0	8.3	8.3	17.6	4.3
. Professional Designation	7.7	8.3	8.3	17.6	4.3
. Other	5.1	8.3	8.3	5.9	-
(#9) TECHNICAL STAFF REQUIREMENTS (%) ≠100					
. High School Completion	19.2	25.0	20.8	11.8	17.4
. Some University	11.5	16.7	4.2	17.6	13.0
. University Graduation	5.1	8.3	4.2	-	8.7
. Workshops/Courses	14.1	16.7	12.5	5.9	17.4
. Technical Studies Specific to Discipline	23.1	41.7	33.3	11.8	8.7
. Apprenticeship with Peer/Mentor	15.4	25.0	12.6	23.5	4.3
. Professional Designation	-	-	-	-	-
. Other	9.0	8.3	12.5	5.9	4.3
(#11) TRAINING FOR STAFF? (%)					
. Yes	69.0	75.9	70.3	64.5	70.0
. No	31.0	24.1	29.7	35.5	30.0
	100.0	100.0	100.0	100.0	100.0
(#11) IF YES, TRAINING PROVIDED (%) ≠ 100					
. Attendance at Courses/Workshops	77.0	63.6	92.3	80.0	71.4
. Attendance at Conferences	61.0	50.0	76.9	45.0	71.4
. University Courses	8.0	-	11.5	15.0	14.3
. Other	20.0	36.4	11.5	-	19.0
(#11) TRAINING RECEIVED IN N.S.? (%)					
. Yes	60.0	81.0	40.0	75.0	50.0
. No	40.0	19.0	60.0	25.0	50.0
	100.0	100.0	100.0	100.0	100.0

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	TOTAL N=187	FOR PROFIT COMPANY N=33	PROFESSIONAL NOT FOR PROFIT N=44	AMATEUR NOT FOR PROFIT ORGANIZATION N=62	SERVICE ORGANIZATION N=42
(#12) MEMBERS OF UNION, ORGANIZATION, OR PROFESSIONAL ORGANIZATION? (%)					
. Yes	63.0	56.2	79.5	53.0	62.5
. No	36.0	43.8	20.5	47.0	37.5
	100.0	100.0	100.0	100.0	100.0

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	TOTAL N=187	FOR PROFIT COMPANY N=33	PROFESSIONAL NOT FOR PROFIT N=44	AMATEUR NOT FOR PROFIT ORGANIZATION N=62	SERVICE ORGANIZATION N=42
(#12) IF YES, AFFILIATION (%) ≠ 100					
· Alliance of Canadian Cinema, Television, and Radio Artists (ACTRA)	7.4	-	12.9	-	15.0
· Association of Cultural Executives	7.4	-	3.2	-	20.0
· Atlantic Federation of Musicians	14.9	22.2	19.4	4.8	5.0
· Atlantic Publishers' Association	3.2	11.1	-	-	-
· Dance Nova Scotia	3.2	-	-	9.5	5.0
· Canadian Actors' Equity Association	8.5	-	3.2	-	5.0
· Federation of Nova Scotia Heritage	21.3	5.6	29.0	19.0	25.0
· International Alliance of Theatrical State Employees (IATSE)	1.1	-	-	-	5.0
· Multi Cultural Association of Nova Scotia	-	-	-	-	-
· Music Industry Association of Nova Scotia	6.4	11.1	3.2	4.8	10.0
· Nova Scotia Choral Foundation	6.4	-	-	23.8	5.0
· Nova Scotia Drama League	6.4	-	-	9.5	-
· Nova Scotia Designer Crafts Council	14.9	50.0	-	4.8	10.0
· Professional Association of Canadian Theatres	3.2	-	-	-	-
· Visual Arts Nova Scotia	8.5	5.6	3.2	9.5	15.0
· Writers' Federation of Nova Scotia	9.6	11.1	9.7	-	-
· Other	55.3	66.7	22.6	42.9	85.0

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	TOTAL N=187	FOR PROFIT COMPANY N=33	PROFESSIONAL NOT FOR PROFIT N=44	AMATEUR NOT FOR PROFIT ORGANIZATION N=62	SERVICE ORGANIZATION N=42
(#13) BENEFITS PROVIDED TO EMPLOYEES (%) * 100					
. Canada Pension Plan	45.0	63.6	65.9	16.1	47.6
. Other Pension Plan	13.0	9.1	22.7	3.2	19.0
. Unemployment Insurance	43.0	57.6	61.4	16.1	47.6
. Workers Compensation	20.0	24.2	38.6	4.8	14.3
. Medical Insurance	22.0	12.1	43.2	4.8	31.0
. Disability Insurance	19.0	18.2	34.1	4.8	21.4
. Liability Insurance	6.0	6.1	18.2	-	4.8
. Life Insurance	7.0	3.0	4.5	1.6	16.7
. RRSP	2.0	3.0	2.3	-	2.4
. Other	3.0	3.0	2.3	-	7.1
(#14) VOLUNTEERS (%)					
. Yes	74.0	6.5	83.3	91.9	87.8
. No	26.0	93.5	16.7	8.1	12.2
	100.0	100.0	100.0	100.0	100.0
(#14) VOLUNTEERS (AVG. NO.)					
Current					
. Board of Directors	11.9	-	14.7	10.8	11.0
. Artists/Performers /Participants	48.6	-	21.3	58.8	37.4
. Support Volunteers	17.9	4.0	28.9	14.3	10.9
. Other	34.6	4.0	39.3	18.2	31.2
5 Years Ago					
. Board of Directors	11.1	-	14.1	9.2	10.6
. Artists/Performers /Participants	45.6	-	14.0	55.7	17.5
. Support Volunteers	16.5	2.0	24.6	14.9	9.5
. Other	17.1	-	20.4	18.6	13.4
5 Years From Now					
. Board of Directors	12.2	-	15.5	10.8	11.2
. Artists/Performers /Participants	60.4	-	37.4	73.2	27.3
. Support Volunteers	23.5	6.0	38.6	18.8	15.5
. Other	41.5	-	39.0	20.9	40.9
(#15) TRAINING FOR VOLUNTEERS? (%)					
. Yes	64.0	60.0	51.4	75.9	45.9
. No	36.0	40.0	48.6	24.1	54.1
	100.0	100.0	100.0	100.0	100.0

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	TOTAL N=187	FOR PROFIT COMPANY N=33	PROFESSIONAL NOT FOR PROFIT N=44	AMATEUR NOT FOR PROFIT ORGANIZATION N=62	SERVICE ORGANIZATION N=42
(#15) IF YES, TRAINING (%) * 100					
. In-house Sessions	75.3	100.0	100.0	70.5	64.7
. Attendance at Courses/Workshops	54.1	-	27.8	70.5	58.8
. Attendance at Conferences	25.9	-	11.1	27.3	41.2
. University Courses	-	-	-	-	-
. Other	5.9	-	5.6	4.5	-
(#16) OFFER APPRECIATION? (%)					
. Yes	43.0	16.7	55.9	43.9	37.8
. No	57.0	83.3	44.1	56.1	62.2
	100.0	100.0	100.0	100.0	100.0
(#17) MEMBERS (Ave. No.)					
. Current	139.0	3.0	223.0	93.7	148.2
. 5 Years Ago	113.0	3.0	192.5	77.3	117.7
. 5 Years From Now	233.0	5.4	329.0	188.7	249.8
(#18) PERFORMANCES /EXHIBITIONS /SHOWS? (%)					
. Yes	86.0	83.3	93.2	96.7	68.3
. No	14.0	16.7	6.8	3.3	31.7
	100.0	100.0	100.0	100.0	100.0
(#18) DURING WHICH SEASONS (%) * 100					
. Summer	68.0	68.0	73.2	62.7	71.4
. Fall	72.0	64.0	78.0	76.3	64.3
. Winter	68.0	52.0	78.0	71.2	60.7
. Spring	71.0	48.0	82.9	81.4	57.1
(#18) AUDIENCE/MARKET (%)					
Current					
. Nova Scotia Residents	75.2	64.8	74.8	76.7	81.1
. Visitors to Nova Scotia	17.8	21.6	17.7	17.5	15.9
. Outside Nova Scotia	7.0	13.6	7.5	5.8	3.0
	100.0	100.0	100.0	100.0	100.0
5 Years Ago					
. Nova Scotia Residents	80.3	63.7	80.8	82.4	88.6
. Visitors to Nova Scotia	15.1	25.9	10.3	15.8	10.6
. Outside Nova Scotia	4.6	10.4	8.9	1.8	0.9
	100.0	100.0	100.0	100.0	100.0

* Situations where total results appear to be inconsistent with organization results are due to 6 respondents who did not select an organization type; their results are included in total results, but did not appear under any organization type.

	TOTAL N=187	FOR PROFIT COMPANY N=33	PROFESSIONAL NOT FOR PROFIT N=44	AMATEUR NOT FOR PROFIT ORGANIZATION N=62	SERVICE ORGANIZATION N=42
5 Years From Now					
. Nova Scotia Residents	72.3	53.1	73.7	76.8	81.0
. Visitors to Nova Scotia	17.9	23.2	15.5	18.3	16.1
. Outside Nova Scotia	9.3	23.7	10.8	4.9	2.9
	100.0	100.0	100.0	100.0	100.0
(#19) OUTLOOK OF MARKET/AUDIENCE IN 5 YEARS (%)					
. Increase	70.0	87.0	84.6	54.4	67.7
. Decline	3.0	4.3	2.6	1.8	3.2
. Remain Same	27.0	8.7	12.8	43.8	29.0
	100.0	100.0	100.0	100.0	100.0
(#19) PERCENTAGE INCREASE (Ave. %)	85.5	160.8	66.4	80.1	54.3
(#19) PERCENTAGE DECLINE (Ave. %)	19.0	10.0	5.0	40.0	-
(#20) SELL PRODUCTS? (%)					
. Yes	49.0	100.0	53.5	29.8	33.3
. No	51.0	-	46.5	70.2	66.7
	100.0	100.0	100.0	100.0	100.0
(#20) SALES					
Current					
. Nova Scotia	74.5	51.3	90.0	82.8	93.4
. Other Canada	15.1	28.6	4.9	8.8	6.3
. United States	7.9	14.5	3.6	7.6	0.3
. Other Countries	2.5	5.6	1.5	0.8	-
	100.0	100.0	100.0	100.0	100.0
5 Years Ago					
. Nova Scotia	81.6	58.4	92.2	82.8	93.4
. Other Canada	10.5	22.6	5.3	8.8	6.3
. United States	6.2	15.1	0.4	7.6	0.3
. Other Countries	1.7	3.9	2.1	0.8	-
	100.0	100.0	100.0	100.0	100.0
5 Years From Now					
. Nova Scotia	67.9	43.2	87.5	87.7	84.3
. Other Canada	17.2	28.5	6.2	6.3	15.4
. United States	9.5	18.0	2.6	4.9	0.3
. Other Countries	5.5	10.3	3.8	1.1	-
	100.0	100.0	100.0	100.0	100.0

* Situations where total results appear to be inconsistent with organization results are due to 6 respondents who did not select an organization type; their results are included in total results, but did not appear under any organization type.

	TOTAL N=187	FOR PROFIT COMPANY N=33	PROFESSIONAL NOT FOR PROFIT N=44	AMATEUR NOT FOR PROFIT ORGANIZATION N=63	SERVICE ORGANIZATION N=42
(#21) SALES OUTLOOK IN 5 YEARS (%)					
. Increase	69.3	100.0	63.6	63.2	41.7
. Decline	2.7	-	-	5.3	-
. Remain Same	28.0	-	36.4	31.5	58.3
	100.0	100.0	100.0	100.0	100.0
(#21) PERCENTAGE INCREASE (Ave. %)	84.0	141.4	46.8	17.2	34.0
(#21) PERCENTAGE DECLINE (Ave. %)	45.0	-	-	40.0	-
(#22) FACILITIES USED (%) ≠ 100					
Office					
. Own/Other Residence	30.5	51.5	18.2	32.3	23.8
. Own Commercial Space	10.2	27.3	15.9	3.2	2.4
. Rented Commercial Space	20.3	18.2	27.3	6.5	33.3
. Community Spaces	16.6	-	11.4	30.6	16.7
. Other	12.8	3.0	22.7	11.3	14.3
Meeting					
. Own/Other Residence	22.5	39.4	20.5	21.0	23.8
. Own Commercial Space	9.1	24.2	15.9	3.2	2.4
. Rented Commercial Space	10.7	6.1	18.2	6.5	33.3
. Community Spaces	35.3	3.0	22.7	30.6	6.7
. Other	10.7	-	20.5	11.3	14.3
Production/Performance					
. Own/Other Residence	13.4	30.3	9.1	9.7	7.1
. Own Commercial Space	10.7	33.3	11.4	3.2	4.8
. Rented Commercial Space	17.6	9.1	31.8	11.3	14.3
. Community Spaces	31.6	15.2	27.3	54.8	40.5
. Other	8.0	6.1	18.2	3.2	11.9
Sales					
. Own/Other Residence	9.1	24.2	4.5	6.5	4.8
. Own Commercial Space	8.0	30.3	6.8	1.6	2.4
. Rented Commercial Space	11.8	33.3	13.6	4.8	2.4
. Community Spaces	9.1	9.1	6.8	11.3	7.1
. Other	7.5	6.1	13.6	4.8	7.1
(#23) ANNUAL OPERATING BUDGET (Ave.)	$101,735.00	$194,979.00	$218,497.00	$13,083.00	$63,999.00

* Situations where total results appear to be inconsistent with organization results are due to 6 respondents who did not select an organization type; their results are included in total results, but did not appear under any organization type.

	TOTAL N=187	FOR PROFIT COMPANY N=33	PROFESSIONAL NOT FOR PROFIT N=44	AMATEUR NOT FOR PROFIT ORGANIZATION N=62	SERVICE ORGANIZATION N=42
(#24) EXPENDITURES (%)					
. Salaries, Wages, Benefits	38.8	17.5	57.4	30.4	47.2
. Supplies	21.5	40.0	8.0	14.9	7.4
. Equipment	5.1	7.2	2.7	16.4	4.0
. Sales/Commissions	6.6	13.6	0.6	1.8	6.1
. Rent	2.8	1.5	2.8	7.8	6.1
. Travel	3.3	3.1	2.9	7.2	4.2
. Advertising/Marketing	5.7	5.4	6.6	4.2	3.8
. Training	0.7	0.3	0.5	5.4	2.0
. Other	15.5	11.4	18.6	11.7	19.2
	100.0	100.0	100.0	100.0	100.0
(#24) % EXPENDITURES WITHIN NOVA SCOTIA	87.7	74.2	88.6	88.9	95.4
(#25) OPERATING REVENUES (Ave.)					
. Sales of Product/Service	66,171.00	131,436.00	114,735.00	4,534.00	13,615.00
. Private Sector Fundraising/Donations	18,914.00	32,125.00	38,406.00	3,855.00	14,843.00
. Other Self Generated Revenue	15,203.00	9,163.00	25,790.00	5,959.00	16,306.00
. Municipal/County Grants	9,114.00	20,000.00	7,860.00	1,155.00	12,678.00
. Provincial Grants	37,763.00	51,643.00	53,313.00	4,982.00	38,425.00
. Federal Grants	72,962.00	54,875.00	111,837.00	2,942.00	38,371.00
. Total	113,900.00	83,742.00	265,729.00	11,266.00	69,662.00

* Situations where total results appear to be inconsistent with organization results are due to 6 respondents who did not select an organization type; their results are included in total results, but did not appear under any organization type.

APPENDIX I

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CULTURAL SECTOR FOCUS GROUPS

Rose Adams
Visual Artist
Paradise

Carol Beatty
Continuing Education Dept.
Nova Scotia College of
Art and Design
Halifax

Henry Bishop
Curator
Black Cultural Centre for
Nova Scotia
Dartmouth

Denny Blouin
Heritage Arts of Nova Scotia
Halifax

Wayne Boucher
CARFAC, Visual Artist
Annapolis Royal

Ron Bourgeois
Co-ordinator
Conseil Culturel Acadien de la
Nouvelle-Ecosse
Halifax

Bev Brett
Vice-Chairman
artsCape Breton and
Director, St. Ann's Bay Players
Baddeck

Scott Campbell
The Original Cast Theatre
Annapolis Royal

Ron Caplan
Owner/Editor
Cape Breton's Magazine and Breton Books
Wreck Cove

Winnie Chafe
Performer
Past Chairperson, artsCape Breton
Glace Bay

Laura Clement
President
Performing Arts Sponsors of Nova Scotia
Halifax

Rob Cohn
Owner/Operator
Rob Cohn Production and
Board of Directors, East Coast Music Awards
Halifax

Graham Corbett
Woodturner
Bridgetown

Barry Cowling
Producer
Citadel Communications
Halifax

Marilyn Crawford
Craftsperson/Teacher
Lawrencetown

Dorothy Cunningham
Weaver
Sydney

Heather Davidson
Heritage Researcher
Hantsport

Philip Doucette
Second Vice-President
Nova Scotia Designer Crafts Council
Halifax

Mary Ann Ducharme
Writer/Editor
Mabou

Dr. Richard Field
Director
Dartmouth Heritage Museum
Dartmouth

Thom Fitzgerald
Atlantic Filmmakers' Co-operative and Atlantic
Independent Media
Halifax

Neil Forrest
Chairperson, Crafts Division
Nova Scotia College of
Art and Design
Halifax

Joella Foulds
Music Industry Association
of Nova Scotia
Bras d'Or

Lorraine French
Stained Glass Worker
Sydney

Dennis Gill
Sculpture Department
Nova Scotia College of
Art and Design
Halifax

Don Gillies
Choreographer
Sydney

Jim Howe
Heritage Supervisor
Annapolis Royal

Dean Jobb
Writer
Halifax

Angela Gwynn John
Film Consultant Services
Art Link Management and Consulting
Halifax

Harry Jost
Jost Architects Ltd.
Annapolis Royal

Terry Kelly
Singer/Songwriter
T.K. Productions
Halifax

Valda Kemp
Chairman
Atlantic Woodworkers' Association
Co-ordinator, "Year of Wood"
Halifax

Bruce Klinger
General Manager
Neptune Theatre
Halifax

Marie Koehler-Vandergraaf
Visual Artist
CARFAC N.S. Representative
Dartmouth

Mark Laing
Architect
Halifax

Peter Latta
General Manager
Fairbanks Centre
Dartmouth

Barbara LeBlanc
Grand Pre National Historic Park
Grand Pre

Nancy MacDonald
Manager
Centre Bras d'Or
Baddeck

Stewart MacNeil
Performer
The Barra MacNeils
Sydney Mines

Leo MacNeil
Woodworker
Leo MacNeil Designs
Sydney Mines

Scott Macmillan
Scojen Music Production and
Music Industry Association of N.S.
Halifax

Kathleen Magwood
Craftsperson/Teacher
Bridgetown

Ken Maher
Manager
King's Theatre
Annapolis Royal

Anne Martin
Visual Artist
Glace Bay

Timothy Matthews
President
Symphony Nova Scotia
Halifax

Patricia McClelland
Director
Cape Breton School of Crafts
Sydney

Catherine McKinnon
GroundSwell Records
Halifax

Dianne Milligan
Executive Director
Dance Nova Scotia
Halifax

Scott Milsom
Editor
The New Maritimes,
Board Member, C.M.P.A.
Halifax

Rob Buckland Nicks
Painter/Craftsperson
Bear River

Mern O'Brien
Director
Dalhousie University Art Gallery
Halifax

Bill O'Shea
Louisbourg

Gordon Parsons
Director
Atlantic Film Festival and Co-owner, Wormwood's
Dog & Monkey Cinema
Halifax

Bill Perrot
Choral Director
Middleton

Catherine Phoenix
Co-ordinator
Eye Level Gallery
Halifax

Bill Plaskett
Planner
Halifax

Ed Porter
Studio Division
Nova Scotia College of
Art and Design
Halifax

John Rapson
Director
Maritime Conservatory of Music
Halifax

Pat Richards
President
Halifax Dance Association
Halifax

Tom Roach
Drummer
Lower Sackville

Ellison Robertson
Visual Artist
Sydney

Paul Robinson
Canada Council Regional Representative
Dartmouth

John Robinson
Manager
Th'YARC
Yarmouth

Elizabeth Ross
Executive Director
Federation of Nova Scotian Heritage
Halifax

Peter Rowan
DTK Records
Halifax

Norene Smiley
Co-ordinator
Children's Book Week
Halifax

Mary Sparling
Director
Mount Saint Vincent University
Art Gallery
Halifax

Jim St. Clair
President
Nova Scotia Highland Village
Mabou

Kay Stanfield
Board Member
Visual Arts Nova Scotia
Dartmouth

Andrew Terris
Visual Artist
Halifax

Susan Tileston
VANS Board Member
Annapolis Royal Community Arts Council
Annapolis Royal

Nathaniel Tileston
Landmark Designs Ltd.
Granville Ferry

Andy Wainwright
Poet, University Professor
Halifax

Budge Wilson
Author
Halifax

Sandra Winter
Manager
Art Gallery of Nova Scotia Giftshop
Halifax

APPENDIX J

APPENDIX J

NOVA SCOTIA ARTS AND CULTURE SECTOR STUDY

Focus Group Discussions

AGENDA

1. Introductions
2. Objectives of the Study
3. A Two Phased Approach
    - Phase One: A Profile of the Arts and Culture Sector (Survey of Organizations and Individuals)
    - Phase Two: Opportunities and Needs Assessment (Focus Group Discussions)
4. Interpretation of Selected Key Findings from Preliminary Survey Data
5. Discussion of Needs/Opportunities To Develop Economic Viability
    - Human Resource Development
    - Technological Innovation
    - Market Expansion
    - Quality Improvement
    - Other
6. Role of Stakeholders in Meeting Needs/Opportunities
    - Individual Artists
    - Arts/Culture Associations/Organizations
    - Community Resources (Business, Education, etc)
    - Governments
    - Other

APPENDIX K

TERMS OF REFERENCE

Study of the Arts and Culture Sector in Nova Scotia to Identify Areas of Potential Economic Growth and Development

1. BACKGROUND

Nova Scotia is blessed with a rich and varied cultural heritage and an active and vibrant cultural community. Culture is an integral part of the lives of the people of the province. Not only does culture enhance the quality of life, it also affects the economy.

Indeed, recent economic studies indicate that the arts and culture sector can generate higher than average economic benefits. This is for two reasons: the income produced generally stays within the province where it is generated; and the sector is labour intensive. As a result this sector has higher than average income and employment multipliers. In addition the arts and culture sector provides much needed employment and income in the economy of many communities. The sector's products are of high quality and can be competitive in international markets given the proper backing.

The role of the arts and culture sector in the provincial economy holds potential for further development. The effectiveness and efficiency of the sector can be improved through human resource development, technological innovation, market expansion and quality development. Considering its potential for economic growth and development, the federal and provincial governments are interested in identifying the extent of, and the opportunities in, the arts and culture sector in Nova Scotia.

A key element of this study will be a profile of the arts and culture sector. Data for this profile will be derived from an industry-wide survey. While Statistics Canada gathers some statistics on the arts and culture sector, they are geared towards larger enterprises and are not up to date. To gain a more complete picture, a comprehensive survey of the Nova Scotia arts and culture sector is needed. The survey will provide information on the level and variety of participation in this sector, along with some basic characteristics with respect to incomes, skill levels, markets, etc. Overall, this information will be used by both levels of government in establishing and evaluating economic development programs and will also assist individual artists and cultural organizations in seeking support from the public and private sectors.

A second key element will be an assessment of the opportunities in the various components of the sector and the needs for those opportunities to be realized. These will be identified through the use of focus groups, analysis of survey data, and a review of relevant experience elsewhere as it relates to Nova Scotia. Part of this element will be an assessment of the relative merits of the opportunities identified. This assessment will take into account the relative economic impacts of various activities. It is not intended that this study will generate new economic impact numbers; rather, it will apply the findings of existing evaluations/studies/statistics with respect to culture and arts activities. The information gathered will be used to identify specific areas which show potential for economic growth and development.

2. PROJECT OBJECTIVES

The overall objectives of this project are to:

- assess the level and variety of participation and determine the basic characteristics of the sector in terms of employment, incomes, markets, skill levels and training, seasonality, location, etc.
- identify the opportunities for further economic growth and development (and assess their relative merits) and the needs for these to be realized.

3. SCOPE AND METHODOLOGY

For the purposes of this study, the "arts and culture sector" includes the following areas:

-literary arts (e.g. writing, editing, publishing)
-performing arts (e.g. theatre, dance, music)
-visual arts (e.g. sculpture, painting, photography)
-arts education (e.g. music, theatre, fine arts departments in conservatories and universities, private teachers)
-crafts
-film and video
-sound recording
-heritage resources (excluding government facilities)

Festivals, radio, TV, broadcasting, newspapers, schools and libraries will be excluded unless they can clearly be shown to be strategic for the development of the industry.

This will constitute the "population" to be surveyed.

A. Sector Profile:

(i) Compile and update lists of all those individuals and organizations involved in the arts and culture sector as specified. A starting point will be the mailing lists of the Cultural Federations of N.S., other cultural organizations and government departments. Care will have to be taken to develop a cle[illegible]atabase avoiding duplication.

(ii) Develop two survey questionnaires: one for individuals and one for organizations, in consultation with the project team. The questionnaires will be pre-tested. Appropriate changes to the questionnaires shall be made in consultation with the project team.

(iii) Conduct a comprehensive survey of the arts and culture sector in Nova Scotia. The survey used should reflect the heterogeneous nature of the population and provide statistically significant information on all sub-groups surveyed. The survey should be designed to provide information on the level, variety and location of participation as well as statistically valid observations of the economic characteristics of the arts and culture sector. It will also allow participants to identify opportunities and needs.

(iv) Submit an interim report outlining the findings of this survey to the Project Team.

B. Opportunities and Needs Assessment:

(i) Review existing evaluations/studies/data related to opportunities and the needs of the various components of the arts and culture sector and asess the applicability of the findings for the Nova Scotia situation.

(ii) Determine the number, size and locations of focus groups to be held and develop focus group agendas in consultation with the Project Team.

(iii) Conduct focus groups to identify the opportunities and needs of the various components of the arts and culture sector to further develop its economic viability.

(iv) Assess the relative merits of the opportunities and needs identified, focussing primarily on human resource development, technological innovation, market expansion and quality improvement.

C. Final Report:

(i) Produce a final report encompassing the results of the Sector Profile and Opportunities and Needs Assessment.

(ii) Within the final report, recommend a set of priorities, programs, initiatives and activities to ensure the economic development of the arts and culture sector. If necessary, identify areas and issues for study.

(iii) Accompanying the report shall be a summary designed for dissemination to the general public.

4. ESTIMATED PROJECT COSTS

Costs for the project cannot exceed $60,000. The consultant should provide an estimate of the costs to complete each of the Sector Profile and the Opportunities and Needs Assessment.

5. PROJECT TIMING

The project is expected to be completed within four months of the awarding of the contract. An interim report on the survey is to be submitted to the Project Team within three months of the awarding of the contract. The final report and the summary are to be submitted two weeks prior to the end of the contract.

6. MANAGEMENT

The project shall be managed by a Project Team including representatives of the Atlantic Canada Opportunities Agency; Nova Scotia Department of Industry Trade and Technology; Nova Scotia Department of Tourism and Culture; Communications Canada and the Cultural Federations of Nova Scotia.

The consultant will meet with the Project Team on no less than four occasions, including prior to the commencement of the project, once to approve the survey questionnaires and the format for the focus groups, once to review the findings of the survey and the focus groups and at the completion of the project.

The consultant is ultimately responsible to the Project Team for all matters related to the full and proper execution of the project, to the full satisfaction of the Project Team. Should the consultant encounter any unexpected difficulties which could result in a delay in the completion of the project, the consultant is responsible for bringing the matter immediately to the attention of the Project Team.

7. CONTRACT PROCEDURE

While the proposal is to address all aspects of the terms of reference, the Management Committee reserves the right to issue a contract for a subset of the project. The decision to award the full contract is subject to the availability of funds.

The contract shall be with the Department of Industry, Trade and Technology.

Invoices from the consultant shall be submitted to the Department of Industry, Trade and Technology on a monthly basis. They will include fees and expenses as incurred up to the maximum amount of the approved study cost. Original invoices for expenses must accompany the invoices.

Ten percent of the contract fees will be held pending the completion and delivery of a final report acceptable to the Project Team overseeing the study.

8. REPORT PREPARATION

The consultant will be required to submit five (5) copies of the draft reports.

Once the drafts of the reports have been accepted by the Project Team, the consultant will be required to submit the following:

(i) Interim report on survey - 10 copies.

(ii) Final Report - 15 copies, including one camera ready document.

(iii) Final Report Summary - 30 copies, including one camera ready document.

NB. All final copies will have the cooperation logo along the side.

The consultant shall provide the computer coded survey data, in a mutually agreed upon computer format and media, and shall relinquish all rights to this data for further use.

The consultant will be required to present the findings of the final report to the Project Team and a small number of invited guests. The consultant will supply the Project Team with five (5) copies of the presentation materials.

9. OWNERSHIP

All information collected, materials gathered, and reports produced shall be the sole property of the Government of Canada and the Province of Nova Scotia.

The consultant shall not publish or in any way use the information, materials gathered, and reports produced without the prior consent of both governments, nor publicly advertise or communicate the governments' consideration of the study proposal on the project.

The final report shall contain the following disclaimer clauses:

> The study was undertaken with the encouragement and financial assistance of the Atlantic Canada Opportunities Agency, the Nova Scotia Department of Industry, Trade, and Technology and Communications Canada; and with the cooperation of the Nova Scotia Department of Tourism and Culture and the Cultural Federations of Nova Scotia.
>
> While the report has been reviewed on behalf of Canada and Nova Scotia, any publication that may be authorized does not signify that the contents reflect the views or policies of either government.
>
> Any reference to trade names, or commercial products, in the report does not constitute an endorsement thereof by either government.

10. SUBMISSION OF PROPOSAL

Five copies of the proposal are to be submitted by 4:00pm, October 15, 1991 to:

Betty MacDonald
Senior Economic Analyst
Atlantic Canada Opportunities Agency
P.O. Box 2284, Station "M"
Halifax, Nova Scotia
B3J 3C8

or Suite 600, Central Guaranty Trust Tower
1801 Hollis St., Halifax